



LOGASnet

User Guide for External Organisations

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Section 1 – Introduction

In this Section This section contains a summary of this guide, along with some of the basic features of LOGASnet that you will need to know about.

There is information about user set up and how to access the system, along with information about the various user roles that are defined.

There are also details of where to go if you need more help or support, and links to further training.

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Introduction, Continued

Who is this User Guide for?

This user guide is aimed at all users of LOGASnet from external organisations such as Local Authorities and Auditors.

What is in this Guide?

This guide contains step-by-step instructions for using all the different parts of LOGASnet. There are detailed guides to carrying out the different functions that you may need, as well as some business and procedural information to help put the system into context.

How should I use this guide?

For instructions on how to perform specific tasks, use the table of contents to locate the section that you require. If you are looking for general overviews of a specific subject, these can be found at the start of the relevant topic or section.

You can find an overview of LOGASnet in topic **About LOGASnet**, which you can find on the next page.

Getting More Help and Support

You can contact the LOGASnet helpdesk via email at logasnet.helpdesk@communities.gsi.gov.uk



You can phone the LOGASnet helpdesk on
0303 4442444

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About LOGASnet

Overview LOGASnet is the DCLG's web-based data capture and payments system currently used to support the management of grant claim processing including Housing Revenue Account Subsidy and Supporting People grant. LOGASnet allows DCLG to define structures such as organisations and grants, which makes the system extremely flexible. LOGASnet is not, therefore, limited to specific types of grant and can make payments to any organisation for any grant that has been defined on the system.

LOGASnet is primarily a data capture tool that can interface directly to DCLG's accounting system for payment purposes depending on how data requirements are configured. LOGASnet can be used, therefore, to capture data purely for statistical purposes or to assist with the processing of grant claims and payments. LOGASnet was designed to replace the previous Grants and Subsidies Payments System (GASPS2).

Grants and Cycles

A **cycle** (e.g. *HSGA*) is a mechanism in LOGASnet that allows one or more grants that conform to the same set of business rules to be grouped together for ease of management. As grant claim processing is usually based on a financial year, a particular instance of a cycle is defined by its period. Cycles are further broken down into cycle steps (e.g. *02 – Second Advance*). A particular instance of a cycle is identified by a **period** (e.g. *2007-2008*). For each cycle step, organisations must certify cycle step data to allow payments or receipts to be calculated.

Look at the following example, which you might see on LOGASnet:

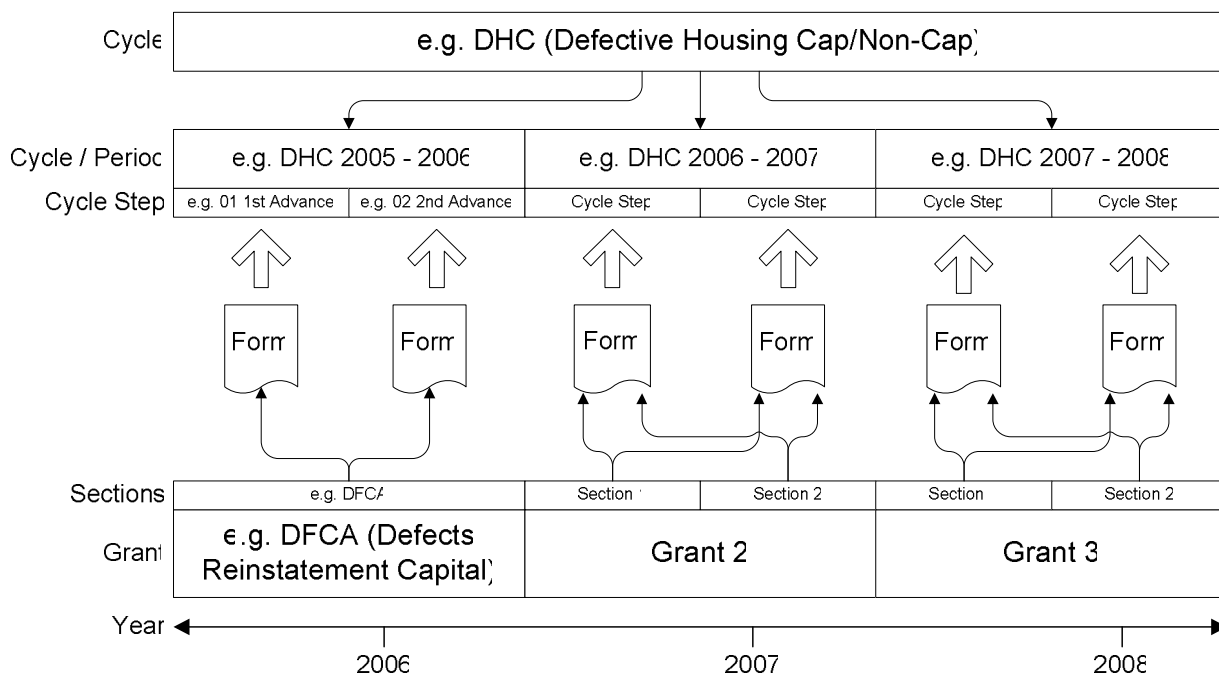
HSBD 2007 - 2008 B1

The **cycle** here is HSBD and the **period** is 2007-2008. The **cycle step** is B1.

The diagram on the following page below shows how grants, cycles and periods fit together.

continued on next page

About LOGASnet, continued



Forms

In order to calculate an organisation's grant claim for a given period, organisations must submit data for the relevant cycle step via a LOGASnet **form** by the submission deadline. These forms are created and maintained by DCLG, and completed online by organisations. The data that are collected via the online forms must be certified by a Claims Certifier within the organisation (or, in the case of an auditor certified cycle step, an approved auditor) before it is available to the DCLG. The data submitted on a form relates to one cycle step for the particular period.

For more information see **Submitting Data for a Cycle Step: An Overview** on page 29.

User Roles

Overview

There are a number of different user roles within LOGASnet. The role(s) that are assigned to you will determine what you can and can't do when using the system, what menu options are available to you etc. Some examples of roles are shown below, but this is not an exhaustive list. More than one role can be assigned to a particular user.

Claims Administrator

Primary point of contact for LOGASnet within an organisation. They are responsible for ensuring that the DCLG has up to date details (name, email address, telephone number etc.) of the CFO, Claims Certifier(s) and Claims Administrator(s).

Responsible for setting up Claims Officer(s) if required, and for informing the Claims Officer(s) of their LOGASnet user ID and activation key.

Allocates field completion responsibilities for a cycle step.

Completes fields on cycle steps, if relevant, and carries out the relevant field and form level validation before the claim is certified.

Carries out management information requests e.g. running the Statement of Amount Due report.

Recipient of emails which advise the organisation of:

- Availability of a cycle step
 - Extension of deadlines
 - Payment transaction emails advising the organisation of payments made or monies owed
-

Claims Officer

Responsible for entering data into those fields on a cycle step which have been allocated to them.

Carries out management information requests e.g. running the Statement of Amount Due report.

continued on next page

User Roles, continued

Claims Certifier

Confirms the accuracy of cycle step data entered by the organisation, and certifies the data.

Carries out management information requests e.g. running the Payments by Organisation report.

Appointed Auditor

A secondary certification of the data may be required. This is typically the case where cycle step data for an organisation would result in a claim of more than £100,000.

Confirms that the cycle step data entered by the organisation conforms to the requirements for audit described in the grant instructions, and certifies the data.

Responsible for setting up Auditor(s) within their own organisation if required, and for informing the Auditor(s) of their LOGASnet user ID and activation key.

Has access to the Form Data Enquiry report and the User Audit Trail report.

Recipient of emails which advise the audit company of:

- Availability of the auditor certified cycle step
 - Extension of deadlines
-

Auditor

Confirms that the cycle step data entered by the organisation conforms to the requirements for audit described in the grant instructions.

Has access to the Form Data Enquiry report

Section 2 – Access and Navigation

In this Section This section explains the process for accessing LOGASnet, as well as giving you an introduction to the main navigational features that you need to know about when using the system.

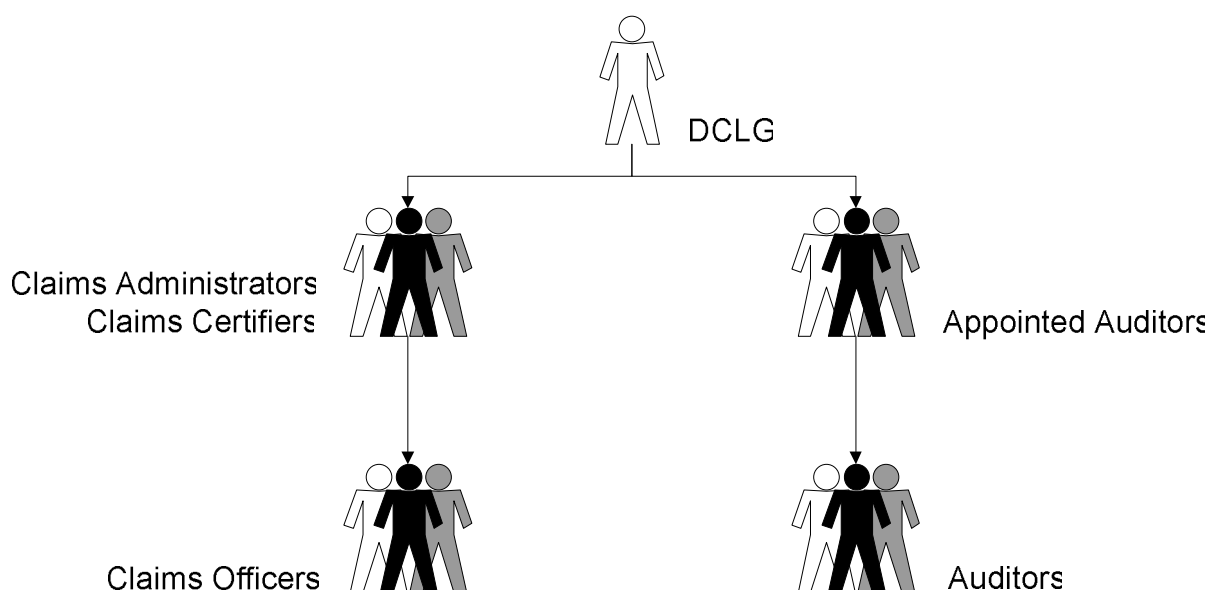
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User Setup

New Users

Claims Administrators, Claims Certifiers and Appointed Auditors are maintained by DCLG and cannot be created by organisations. Requests to set up new **Claims Administrators** and **Claims Certifiers** should, therefore, be emailed to logasnet.helpdesk@communities.gsi.gov.uk. This email should include the forename and surname of the new users, along with their email address, contact telephone numbers and which grants they should be assigned. You can also optionally include an expiry date for the user, after which they will not have access to the system. The requestor must have the same role and grants being requested for the new user; unless the requestor is the Chief Finance Officer (Section 151 officer) or Chief Executive for the authority. Requests for a new Claims Certifier **must** include a confirmation that the new user has the correct financial delegation for the grant(s) requested.

New **Claims Officers** and **Auditors** can be set up by **Claims Administrators** and **Appointed Auditors** respectively. See **Appendix I - Setting Up Claims Officers & Auditors** for full instructions.



Removal of Users

The Claims Administrator(s) within an organisation are responsible for ensuring that users who no longer require access to LOGASnet are removed. For Claims Officer(s), the Claims Administrator has the ability to remove them. For all other users, this can be requested by emailing

logasnet.helpdesk@communities.gsi.gov.uk.

New users are also informed that they should contact the helpdesk as above to inform them when they no longer require system access.

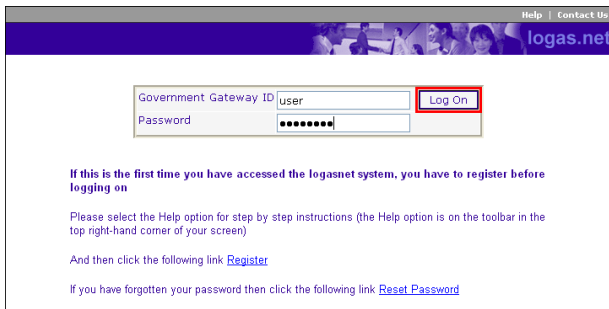
Logging On & Registering

Overview Access to LOGASnet is via an internet browser such as Internet Explorer. Before you can use the system, you must first register to activate your Government Gateway ID.

If you have already registered and received your Government Gateway ID, then you can proceed to logon to the system. Proceed to Step 1 on this page.

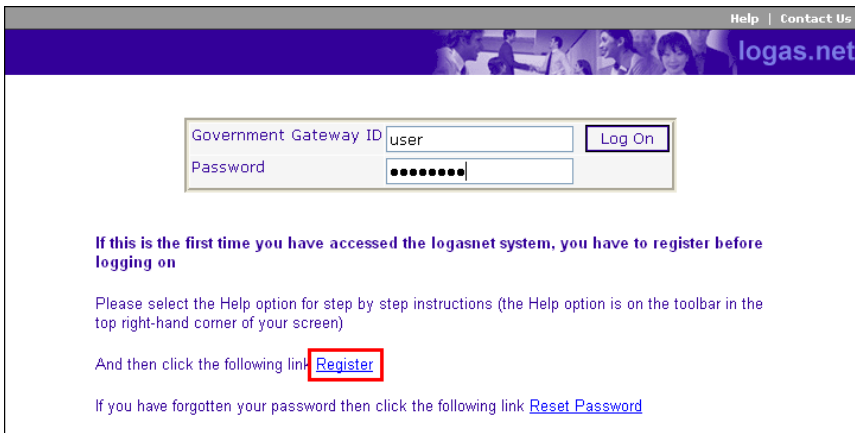
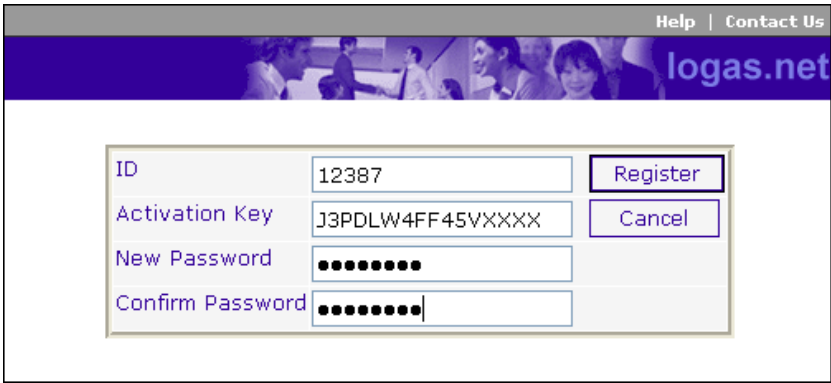
If you have received your user ID and activation key, but have not yet registered, you must now register and choose a password. Proceed to step 4 on the next page.

If you have not yet received your user ID and activation key, you should contact the LOGASnet helpdesk (see page 4, **Getting More Help and Support** for more details).

Step	Action
1	Open your web browser (e.g. Internet Explorer) and go to the following address: https://logasnet.communities.gov.uk/logasnet
2	If you have already registered enter your Government Gateway ID and your password, and click on the Log On button. Be aware that your account will be locked-out for 2 hours after 3 failed log on attempts. Do not try to reset your password if you are locked-out, otherwise you will lock-out your account for 72 hours. 
3	The LOGASnet homepage is displayed. 

continued on next page

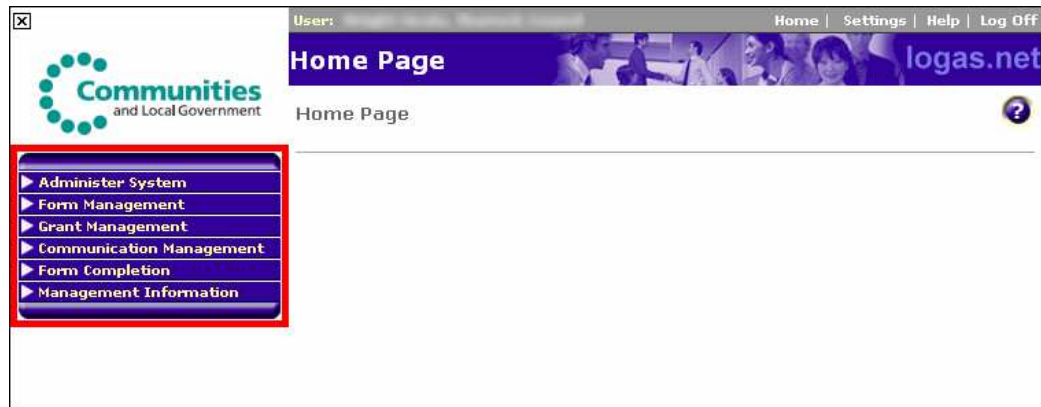
Logging on & Registering, continued

Step	Action
4	If you have received your registration details, but have not yet registered on the system, you must do so before you can login. Click on the <i>Register</i> link on the login screen. 
5	Enter your ID and Activation Key into the relevant fields. Choose a password to use when logging onto LOGASnet, and then confirm it in the Confirm Password field. Ensure your password conforms to the password rules (see Changing your Password on page 20 for more details). Click on the Register button when you are ready to proceed. 
6	LOGASnet then returns the Government Gateway ID, which should be noted down for future use.

Navigating

Menu

The menu is located on the left hand side of the screen, and enables navigation around LOGASnet.



Click on ► to the left of a menu option to expand it, as shown in the picture above. When a menu option is expanded, you can click on ▼ to collapse it again.

The options available to you on the menu depend on your user role. You cannot see certain menu options if your user role does not allow you to do so.

You can hide the menu if required. This can be useful for increasing the visible area of the rest of the screen. Hide the menu by clicking on ☒ in the top left hand corner of the screen. To re-display the menu when you have hidden it, click on ☒.



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Navigating, continued

Crumb Trail

As you navigate around, LOGASnet keeps a track of the path you have taken through the system and displays this information in the **crumb trail**, found in the top left hand corner of the screen.



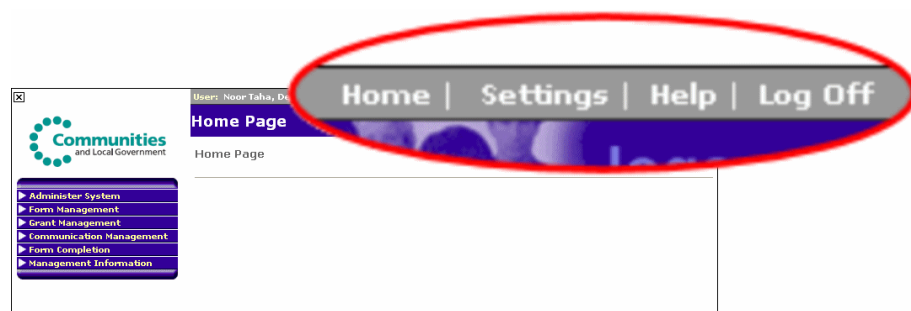
You can click on any of the links in the crumb trail to go back to screens that you have already visited.

NOTE: Use the crumb trail to move forward or backwards through screens you have visited rather than using the **Forward** and **Back** buttons on your browser. Using these buttons can cause unpredictable results,



Links

Links for **Home**, **Settings**, **Help** and **Log Off** are always displayed in the top right hand corner of the screen.



- **Home** returns you to the home page
- **Settings** allows you to change your password and set the default currency
- **Help** opens the help facilities (see the next section for more information)
- **Log Off** exits the system

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Navigating, continued

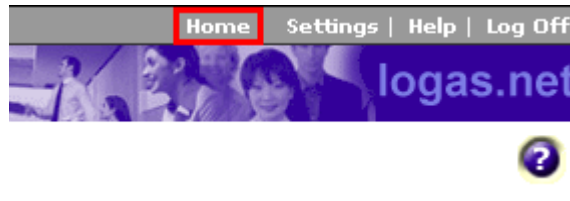
Help Facilities Extensive help is provided within LOGASnet. This can be accessed via the links at the top of the screen or by clicking the ? icon on a specific screen.



Help in the links provides access to the general help facilities, while clicking the ? icon displays specific help about the current screen.

The To Do List

Overview The To Do List is displayed on your LOGASnet homepage. This page is displayed by default when you log on to the system, but you can view it at any time by clicking on the **Home** link on the menu bar.



The **To Do List** contains a list of all claims that require action by you. This can be anything from fields on the form that have been allocated to you for completion, to forms that require your certification.

A screenshot of the LOGASnet Home Page. The page has a blue header with the text 'Home Page' and 'logas.net'. Below the header, there is a section titled 'To Do List' which contains a table. The table has five columns: 'Organisation', 'Cycle,Period,Step', 'Status', 'Deadline', and 'Action'. There are four rows of data in the table, each with a blue 'Edit' link in the 'Action' column. A small circular help icon with a question mark is visible in the top right corner of the page.

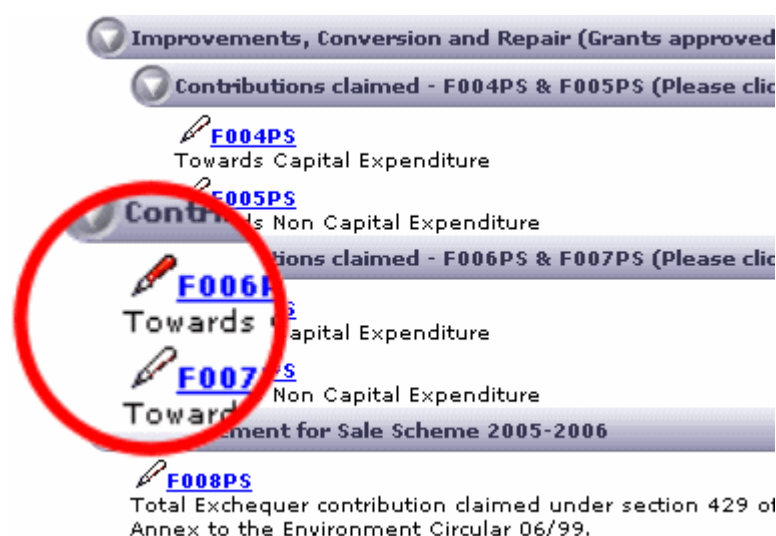
Organisation	Cycle,Period,Step	Status	Deadline	Action
HSBD	2007 - 2008,B1	WIP	31/08/2006	Edit
HSGA	2006 - 2007,02	WIP	31/08/2006	Edit
HSGA	2005 - 2006,03	WIP	30/09/2006	Edit
POOL	2006 - 2007,03	New	31/01/2007	Edit

If there are no items in the **To Do List**, then nothing is displayed on the **Home Page**.

Field Notes

Overview Field notes are free format text fields attached to each field on a form. They are a way of recording and communicating information about that field for a specific cycle step. Field notes can be entered by any authorised user of LOGASnet for any purpose, and more than one note can be added to a particular field.

Field notes are non-mandatory, and do not have to be completed if not required, but once they are added they cannot be deleted. They can be viewed by anyone who has view access to a form.

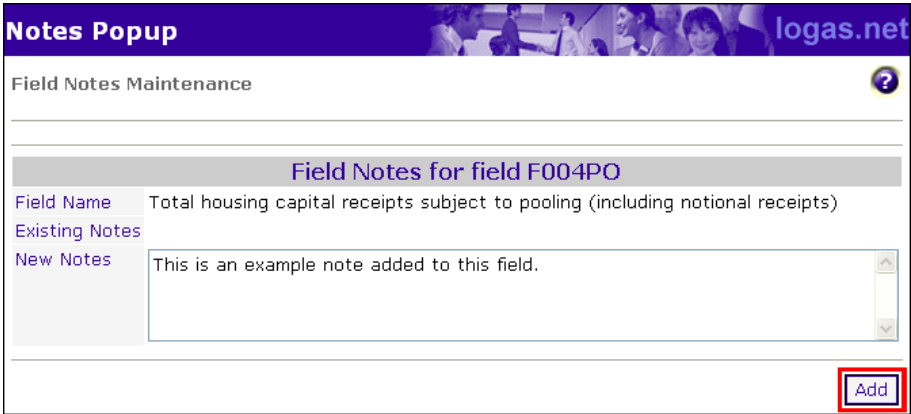
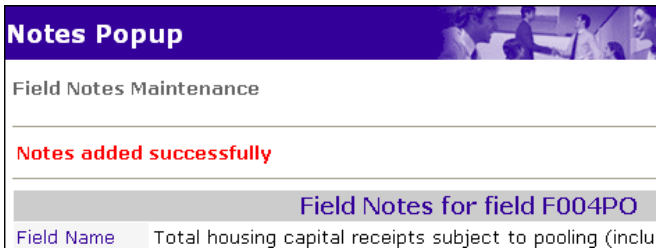


To access field notes, click on the pencil icon next to a particular field. A white pencil indicates that there are no notes against the field, while a red pencil indicates that some notes have already been entered.

Step	Action
1	Click on the pencil icon next to the field for which you wish to create a field note.

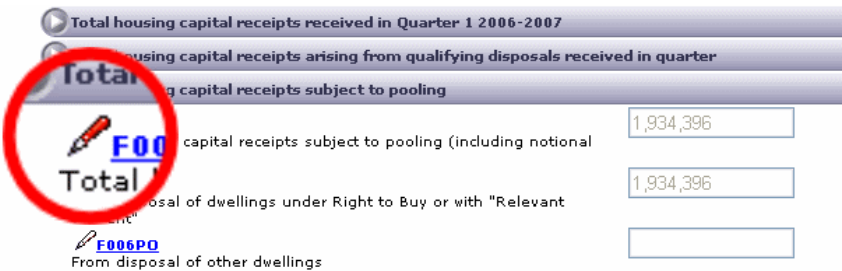
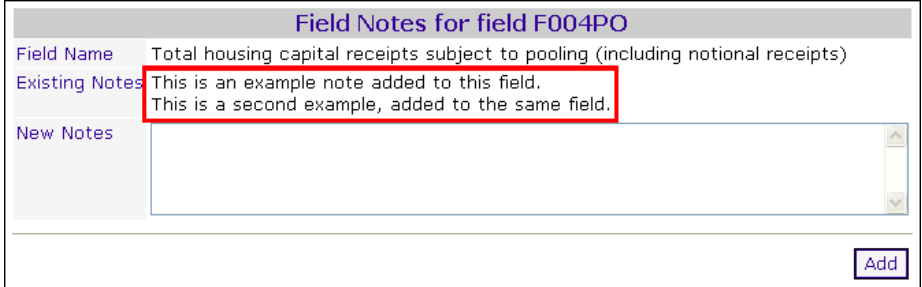
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Field Notes, continued

Step	Action
2	The Notes Popup screen is displayed in a new window. Enter the field note text in the New Notes field. Click on Add when you have finished. 
3	A message is displayed, confirming that the note has been saved. You can now close the Notes Popup window. 

continued on next page

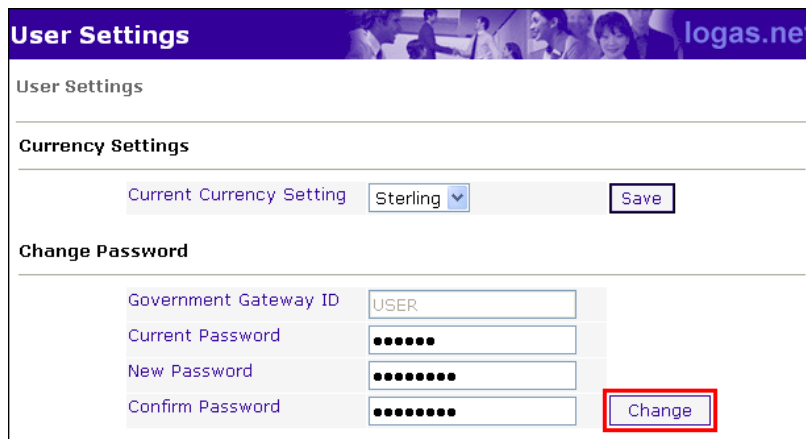
Field Notes, continued

Step	Action
4	The pencil icon against a field will be red once field notes have been added against it. 
5	Click on the pencil icon to view the field notes. Existing notes are displayed in a list at the top of the notes maintenance popup window. 

Changing your Password

Overview This topic explains how to change your LOGASnet password. You cannot reuse any of your previous 10 passwords on LOGASnet, and the new password you choose must meet the following criteria:

- minimum length of 8 characters
- maximum of 20 characters
- must contain at least one numeric character
- must contain at least four alphabetic characters
- must contain at least one non-alpha-numeric character, e.g. £, & or *
- must not contain, in any part of the password, words that can be found in a dictionary e.g. million
- should not contain more than three repeating characters

Step	Action
1	Click on the Settings link in the top right hand corner of the screen. 
2	Enter your Current Password and your choice of New Password into the fields on the screen. Confirm your new password in the Confirm Password field and click the Change button. 
3	A message is displayed confirming that your password has been changed. You must use your new password next time you log on.

Section 3 – Cycles and Cycle Steps

In this section This section will cover the following topics:

Topic	See Page
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Allocating Field Completion Responsibilities	26
Submitting Data for a Cycle Step: An Overview	29
Completing Forms	30
Certifying Cycle Steps	36
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Overview of Cycles & Cycle Steps

Overview A cycle (e.g. DFG) is a mechanism in LOGASnet that allows one or more grants that conform to the same set of business rules to be grouped together for ease of management. As grant claim processing is usually based on a financial year, a particular instance of a cycle is defined by its period. Cycles are further broken down into cycle steps. For each cycle step, organisations must certify cycle step data to allow payments or receipts to be calculated.

There is more information about cycles, cycle steps and grants in the topic **About LOGASnet** on page 5.

When a cycle step is released by the DCLG, an email communication is sent to the Claims Administrator(s), who have been assigned all the same grants that are associated with the cycle step, of the eligible organisations giving notice that the relevant form will shortly become available for completion. When available, organisations can then use the online form to submit their data for the particular cycle step.

The email communication may also attach a covering letter and help text for that cycle step.

Form Navigation

Overview

There are a number of navigational features that you can use when viewing or completing claims. These are located at the top of the screen, and remain in place throughout.

NOTE: Be especially aware of the system timeout when entering data into forms. This is a security mechanism which logs you off after **20 minutes** of inactivity. Ensure that you **save your data regularly** when completing forms, as data will be lost if the system times out.

Expanding & Collapsing Fields

The fields on a particular form are displayed in a cascaded menu, and you can choose which fields are displayed at any given time by using the menu cascades on each heading within the form.

The **Expand** button expands the whole form so you can see all the fields at once. Once clicked, the button changes to **Collapse**. Click **Collapse** and the form will collapse back to the initial view. Note that the **Expand / Collapse** button is also found at the bottom of the screen.

continued on next page

Form Navigation, continued

Finding Fields

To jump directly to a specific field, select the field using the drop down list and click on **Go**.

The screenshot shows a form navigation interface. On the left, there is a dropdown list of fields: F001PO, F002PO, F003PO, F004PO, F008PO, F009PO, F029PO, and F030PO. A yellow arrow points to F003PO. To the right of the list is a 'Go' button. Further right is a 'Recalc' dropdown menu set to 'Auto'. Below the list is a 'View' button. The form title is 'Pool 2006 - 2007'.

Manual and Automatic Calculations

Use the **Recalc** drop down list to set whether you want calculations on the form to be performed automatically (*Auto*) or manually (*Manual*) and click **Apply**. By default, *Auto* takes precedence. *Auto* will recalculate relevant values on a form every time a value is changed.

The screenshot shows the 'Recalc' dropdown menu with 'Manual' selected. The 'Validate' dropdown is set to 'Fields' and the 'Count' dropdown is set to 'Unchanged'. The 'Apply' button is visible. The form title is 'HSBD 2006 - 2007 - 03 : New'.

If you select *Manual* recalculation, a **Recalc** push button is displayed alongside the **Expand** and **View** buttons. Use the **Recalc** button to carry out manual calculations when required. On a large form with many fields, this may mean that you have to click the **Recalc** button many times, so could potentially be time consuming.

The screenshot shows the form navigation interface with the 'Recalc' button highlighted by a red box. The 'Recalc' dropdown is set to 'Manual'. The form title is 'HSBD 2006 - 2007'.

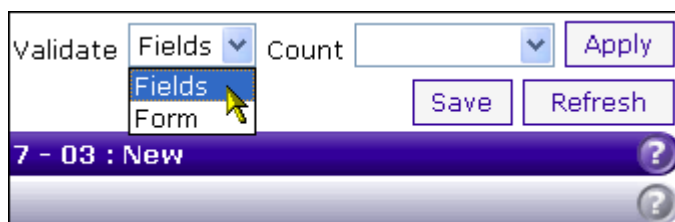
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Form Navigation, continued

Validation Options

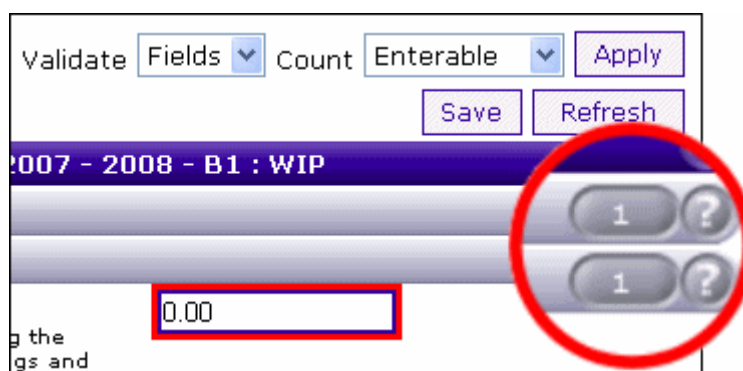
You can choose whether to validate the form data at field level or at form level (see **Completing Forms** on page 30 for more information about validation options).

Use the **Validate** drop down list to select field or form level validation, and click **Apply** to confirm your choice.



Field Counts

Field counts display information about the number of fields on a form which meet your chosen criteria. For example, you can choose to display counts of the number of 'enterable' fields i.e. those fields into which you can enter data. Make your selection from the **Count** drop down list, and click on the **Apply** button.



Field counts are displayed on the right hand end of each heading within the form. Fields which have been counted are highlighted, as shown in the picture above.

Page Break

Allocating Field Completion Responsibilities

Overview This topic shows you how to allocate field completion responsibilities to the relevant users within your organisation. Users can only complete a field for a cycle step if it has been specifically allocated to them. You can allocate field completion responsibilities on a field by field basis if required, or you can allocate all fields on a given section of a form to a particular person. You can copy responsibilities from a previous cycle steps if required, or you can set them up from scratch if you prefer.

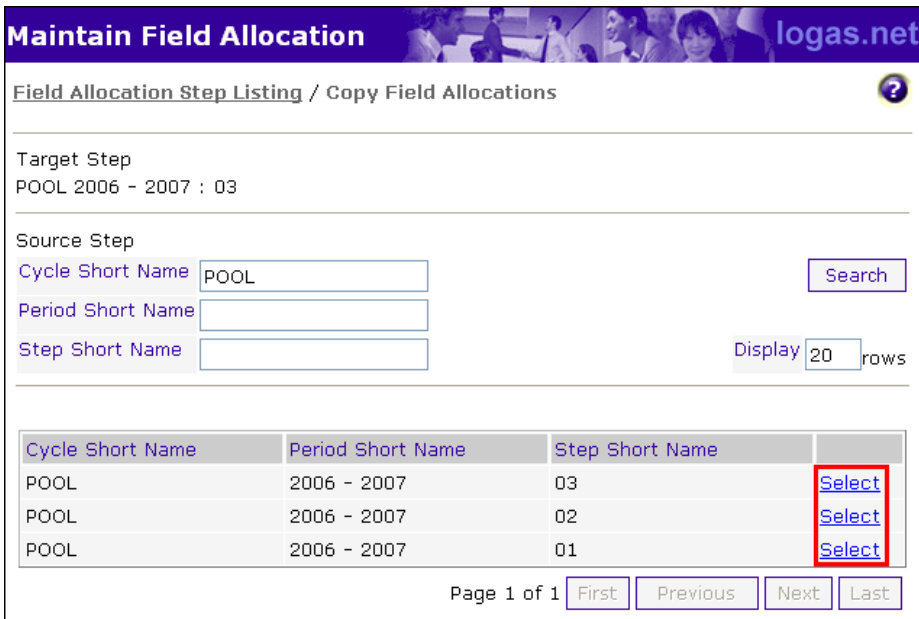
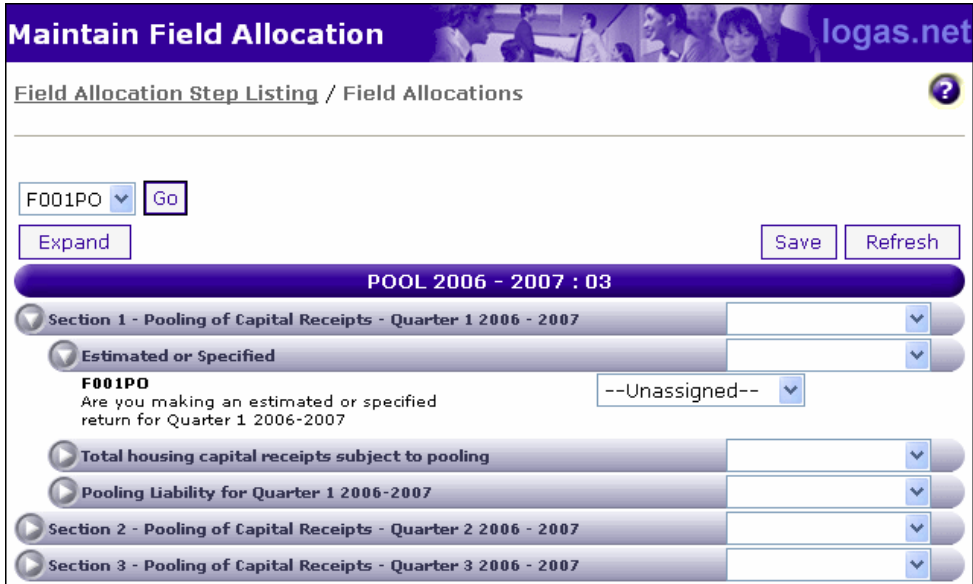
Fields can only be allocated to **Claims Administrators** and **Claims Officers**.

From the menu, select **Form Completion ► Maintain Field Allocation**. The Field Allocation Step Listing screen is displayed, showing all cycle steps for which you can allocate fields.

Step	Action						
1	Use the Cycle and Step fields at the top of the screen and the Search button to locate the cycle step for which you wish to allocate field responsibilities.  <table> <tr> <th>IF</th><th>THEN</th></tr> <tr> <td>You wish to copy responsibilities from a previous cycle step</td><td>Click on the Copy From link in the Action column and then go to step 2</td></tr> <tr> <td>You wish to set the responsibilities up from scratch</td><td>Click on the Cycle : Step link, and then go to step 3</td></tr> </table>	IF	THEN	You wish to copy responsibilities from a previous cycle step	Click on the Copy From link in the Action column and then go to step 2	You wish to set the responsibilities up from scratch	Click on the Cycle : Step link, and then go to step 3
IF	THEN						
You wish to copy responsibilities from a previous cycle step	Click on the Copy From link in the Action column and then go to step 2						
You wish to set the responsibilities up from scratch	Click on the Cycle : Step link, and then go to step 3						

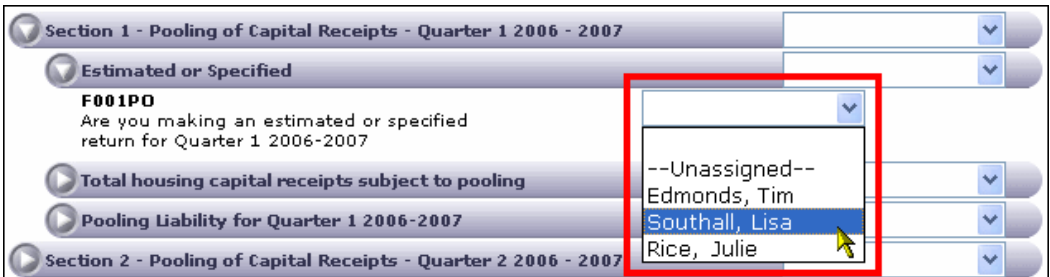
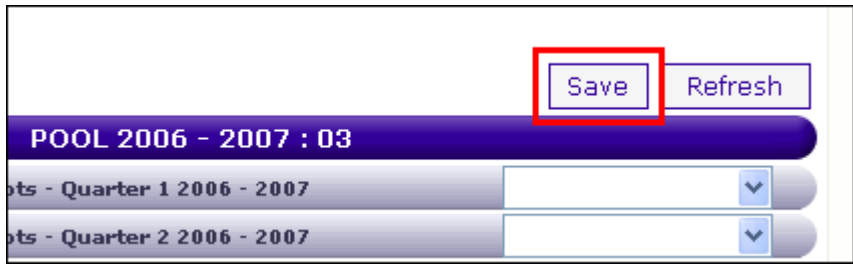
continued on next page

Allocating Field Completion Responsibilities, continued

Step	Action
2	Use the fields at the top of the Copy Field Allocations screen and the Search button to locate the cycle step from which you wish to copy responsibilities. When you have located the relevant cycle step, click on the Select link. 
3	The Field Allocations screen is displayed. Locate the heading, sub-heading or field that you wish to allocate. 

continued on next page

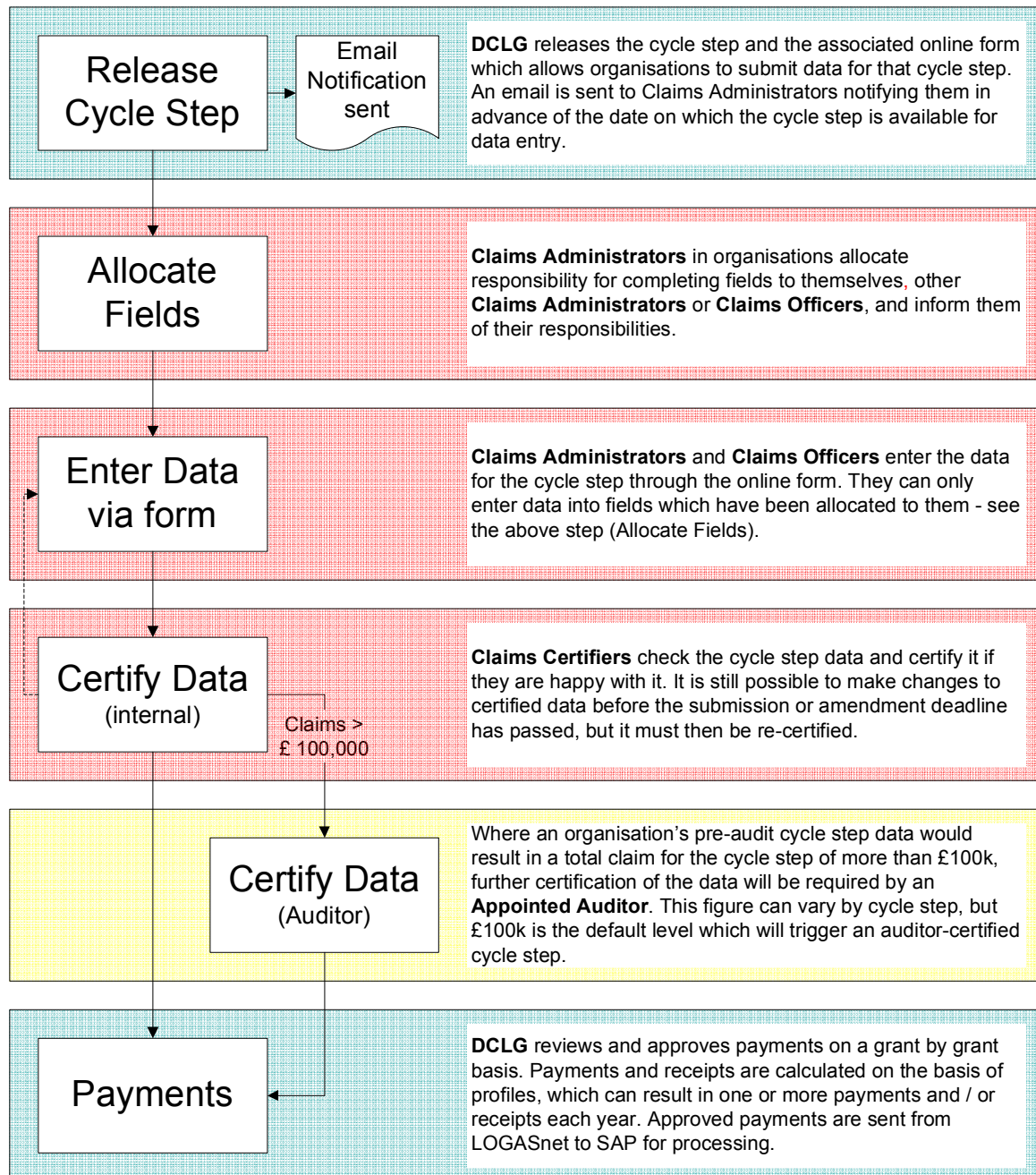
Allocating Field Completion Responsibilities, continued

Step	Action
4	Use the drop down list to select the user to whom you wish to allocate field completion responsibilities. 
5	When you have made the required changes, click on the Save button, located at the top and bottom of the form. 

Submitting Data for a Cycle Step: An Overview

Overview

Organisations submit data for the cycle step via an online form. The diagram below shows the process at a high level from when the cycle step is released through to payments.



Completing Forms

You should ensure that you are familiar with the topic **Form Navigation** on page **23** before you start this topic.

Overview Data for a cycle step is entered via an online form by **Claims Administrators** and **Claims Officers** within an organisation.

Cycle step data must be validated at both field and form level to ensure that the data is valid.

Field Validation checks that the data in a given field meets basic criteria such as being numeric etc. Any errors are highlighted as soon as you have entered a value in a field and then moved the cursor out of that field. An example of a field validation message is shown below.

Form Validation cross-checks fields against each other. For example, if the value in a particular field cannot be greater than 25% of the value of another field, this would be checked during form validation. Form validation is required as the fields on a form may be assigned to more than one person for completion, and a cross-check of the fields is required when **all** the data has been entered. An example of a form validation message is shown below.

You can select whether to validate data at field or form level using the **Validate** drop down list, found at the top of every form. The default selection is to validate at **Field** level, but you should always validate at **Form** level as well.

continued on next page

Completing Forms, continued

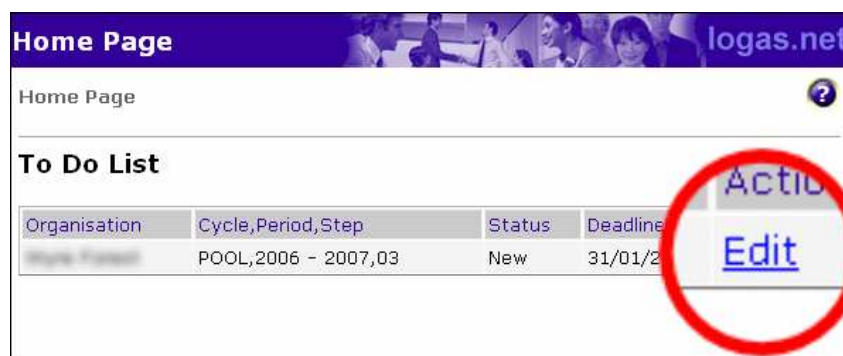
When you have validated data at either field or form level, you can use the field count function (see **Field Counts** on page 25) to check for *Errors*. If you **Collapse** the form after you have displayed the field counts, you can quickly see in which sections any errors are located.

Recalc	Auto	Validate	Form	Count	Errors	Apply	Save	Refresh
: POOL 2006 - 2007 - 03 : WIP								
Capital Receipts - Quarter 1 2006 - 2007							1	?
Capital Receipts - Quarter 2 2006 - 2007							0	?
Capital Receipts - Quarter 3 2006 - 2007							0	?

continued on next page

Completing Forms, continued

Accessing Forms You can access forms in one of two ways. Firstly, you can access them via the **To Do List** that appears on your home page. Simply click on the **Edit** link for the cycle step, as shown in the example below, and then proceed to step 4 of this topic.



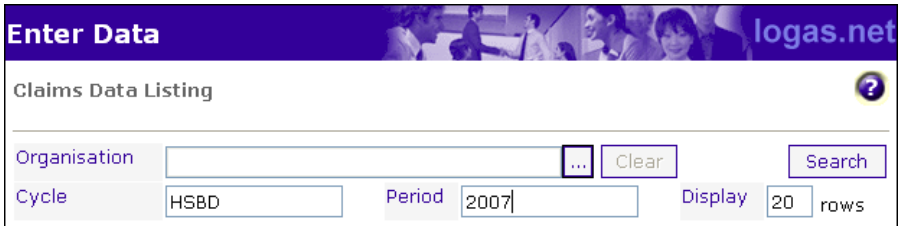
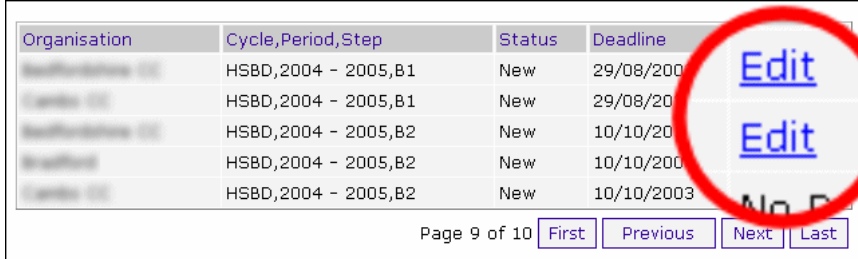
Secondly, you can access a form from the LOGASnet menu. Start from step 1 on below to complete a form via this method.

Remember: LOGASnet will automatically log you off after 20 minutes of inactivity. If this happens and you have not saved your cycle step data you will have to re-enter it. Ensure that you **Save** regularly to prevent this from happening.

Step	Action
1	Select Form Completion ► Enter Data from the menu. All cycle steps, for which the user has all the relevant grant associations, are listed on the Claims Data Listing screen. The screenshot shows the 'Enter Data' screen of LOGASnet. It features a 'Claims Data Listing' section with search filters for 'Organisation', 'Cycle', and 'Period'. There is a 'Search' button and a 'Display' dropdown set to '20 rows'. Below the filters is a table with columns: Organisation, Cycle, Period, Step, Status, Deadline, and Action. The first row shows 'POOL, 2006 - 2007, 03' with a status of 'New' and a deadline of '31/01/2007'. The 'Action' column for this row contains an 'Edit' link. At the bottom, there is a pagination bar showing 'Page 1 of 1' and buttons for 'First', 'Previous', 'Next', and 'Last'.

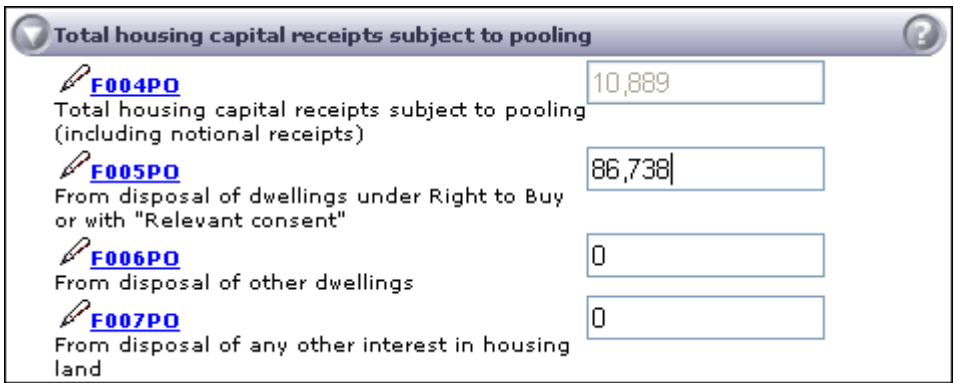
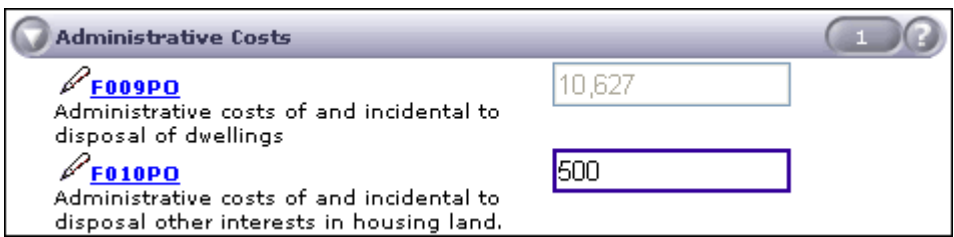
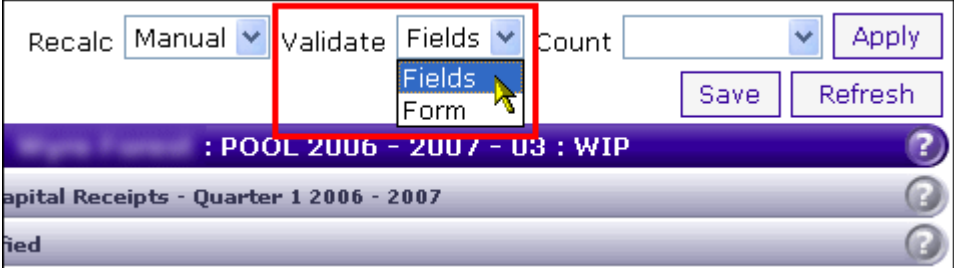
continued on next page

Completing Forms, continued

Step	Action
2	You can use any or all of the search facilities at the top of the screen to filter the list of cycle steps. Use the ellipsis [...] button to search by organisation and complete the Cycle and Period fields if required. Both of these fields will match any or all of the text you enter, so if you enter 2007 in the Period field, cycles for 2006-2007 and 2007-2008 are displayed.  Click on the Search button to apply your search criteria to the list.
3	When you have located the relevant cycle step, click on the Edit link at the right hand end of the list, and the form is displayed allowing you to enter data. 
4	To jump to a specific field on a form, select the field from the drop down list at the top left of the form and click on the Go button. 

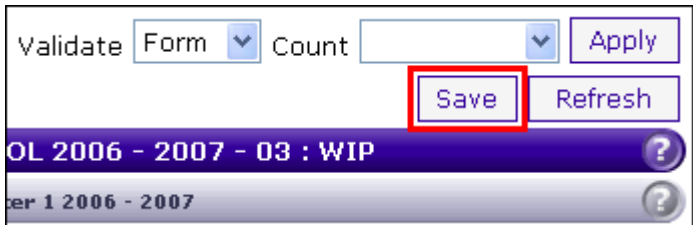
continued on next page

Completing Forms, continued

Step	Action
5	Click the Expand button to display all fields on the form, or expand the form using the arrows next to the headings and sub headings. All fields are displayed, but you can only enter data into those fields which have been allocated to you.  TIP: If you use the field count function (see Field Counts on page 25) to count all <i>Enterable</i> fields then all fields into which you can enter data will be highlighted, as shown in the example below. 
6	You can validate data at both field and form level using the Validate drop down list. An explanation of field and form validation can be found in the Overview at the start of this topic. It is likely that Claims Administrators will predominantly use form level validation, were Claims Officers will predominantly use field level validation. 

continued on next page

Completing Forms, continued

Step	Action
7	Click on the Save button when you have finished. You can find the Save button at the top and the bottom of the form.  The screenshot shows a web form interface. At the top, there are labels 'Validate' and 'Form' followed by a dropdown arrow, and 'Count' followed by an empty input field and a dropdown arrow. To the right of these are two buttons: 'Apply' and 'Save'. The 'Save' button is highlighted with a red rectangular box. Below these elements is a purple horizontal bar with the text 'OL 2006 - 2007 - 03 : WIP' and a question mark icon on the right. Below this bar is a grey horizontal bar with the text 'er 1 2006 - 2007' and a question mark icon on the right.

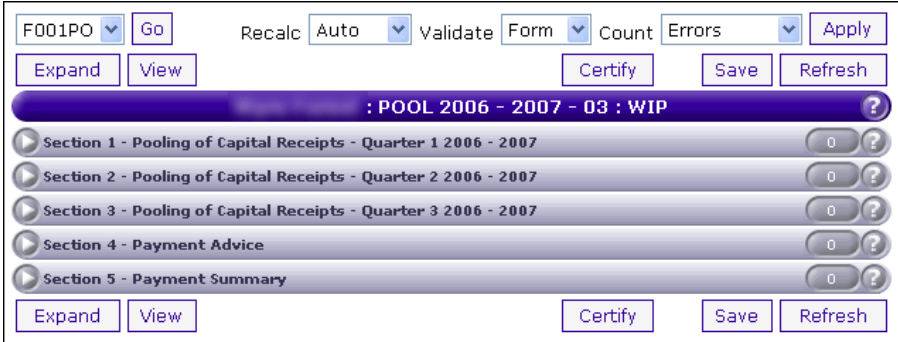
Certifying Cycle Steps

*You should ensure that you are familiar with the topic **Form Navigation** on page 23 before you start this topic.*

Overview Data for a cycle step must be certified before it can be used by DCLG for payment calculation. This certification will be carried out by a **Claims Certifier** providing the **Claims Certifier** has not been responsible for any data entry and has been assigned all the grants associated with the cycle step.

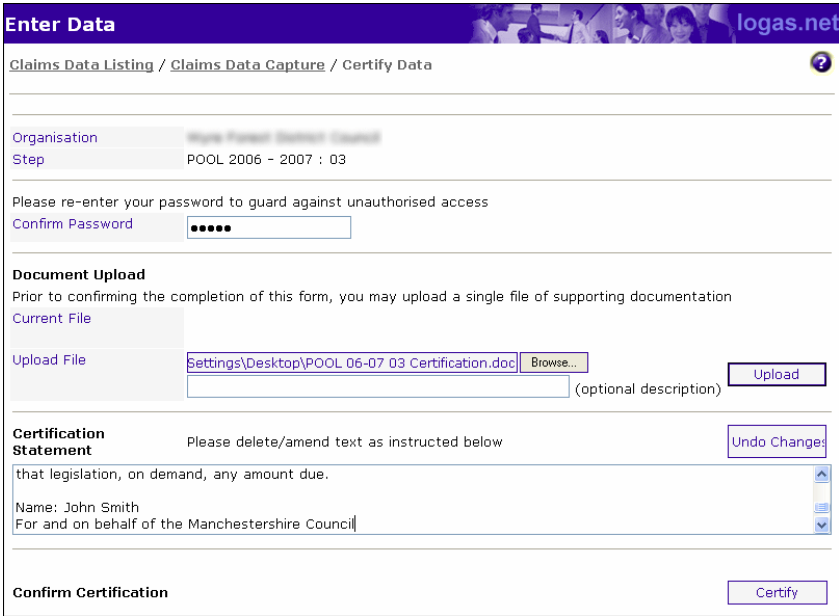
Additionally where the cycle step data would result in a claim for more than £100k, the data will also require certification by an **Appointed Auditor**. (In exceptional circumstances, DCLG may set a threshold for the cycle step that is higher than £100k.)

If you are a **Claims Certifier** or an **Appointed Auditor** any cycle steps available for certification are displayed in the **To Do List** on your LOGASnet home page. You can also access cycle steps via **Form Completion ► Enter Data** on the menu.

Step	Action
1	Click the Edit link on the cycle step that you wish to certify. 
2	Use the fields at the top of the form to expand and view the data. If required, you can also carry out field and form level validation, and apply field counts. In the example below an Errors field count has been applied. This count is showing that no errors have been found. 

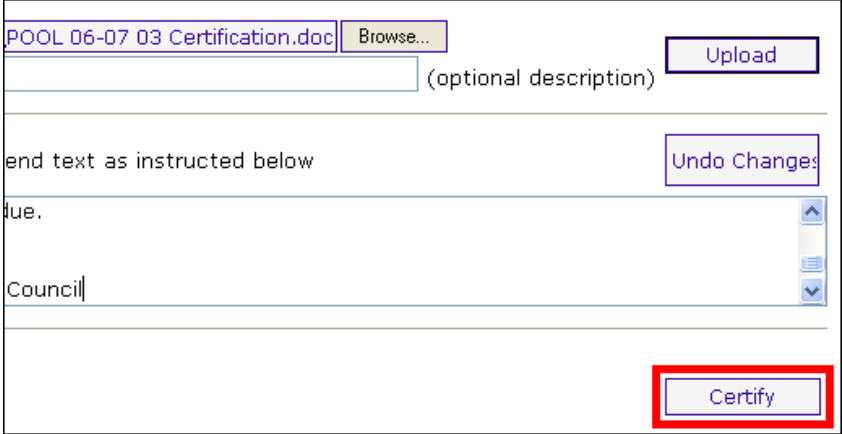
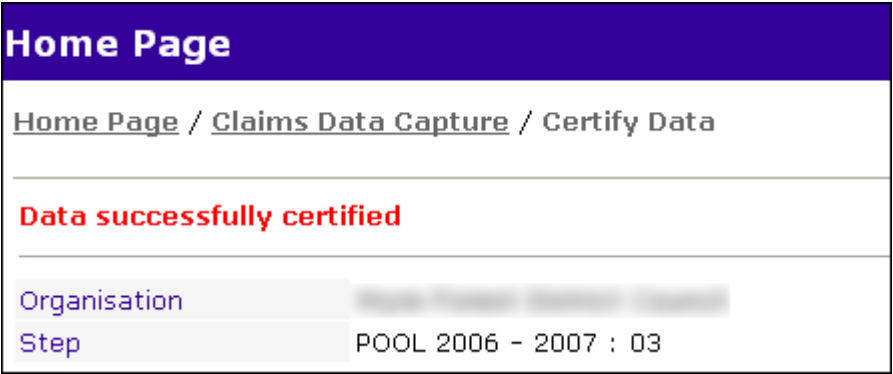
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Certifying Cycle Steps, continued

Step	Action
3	Click on the Certify button when you are ready to certify the cycle step (if fields have failed a validation check (i.e. have errors) the certification process will fail). NOTE: If you cannot see the Certify button, this is because you are not set up as a Claims Certifier, or you do not have the required grant assignment. 
4	Enter the required data onto the Certify Data screen. You must enter your password into the Confirm Password field to confirm the certification.  Before you click the Certify button on this screen you can also choose: • Upload File, which allows you to upload a single file of supporting documentation. Locate the relevant file using the Browse button and click on Upload when you have done so. • Certification Statement, which lets you delete or amend the certification text. You can revert to the original version of this text by clicking on the Undo Changes button.

continued on next page

Certifying Cycle Steps, continued

Step	Action
5	Click the Certify button in the bottom right hand corner of the screen when you are ready to proceed. 
6	A message is displayed at the top of the screen confirming that the certification has been successful. 
7	Ensure you print a copy of the certify data screen at this point by selecting File ► Print from the Internet Explorer menu bar, or by clicking on the Print button at the top of the screen.  The sheet will be printed with “Data successfully certified” at the top of the sheet. The certification statement will not be included if you print a copy of the certified data using the <i>Form Data Enquiry</i> report, although this report will confirm that the data has been certified.

continued on next page

Certifying Cycle Steps, continued

Step	Action										
8	The status of the cycle step changes to <i>Certified</i>, unless this is not the first time it has been certified. In this case, the status of the cycle step is shown as <i>Re-Certified</i> as in the example below. <table><tr><th>Organisation</th><th>Cycle,Period,Step</th><th>Status</th><th>Deadline</th><th>Action</th></tr><tr><td></td><td>POOL,2006 - 2007,03</td><td>Re-certified</td><td>13/04/2007</td><td>View</td></tr></table>	Organisation	Cycle,Period,Step	Status	Deadline	Action		POOL,2006 - 2007,03	Re-certified	13/04/2007	View
Organisation	Cycle,Period,Step	Status	Deadline	Action							
	POOL,2006 - 2007,03	Re-certified	13/04/2007	View							

Amending Cycle Steps

Overview Amendments before the amendment deadline

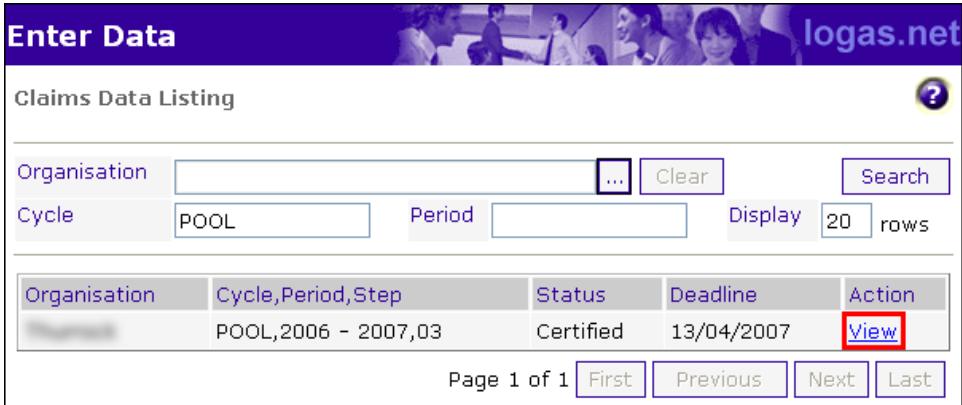
Once data for a cycle step has been certified, it will no longer appear in the **To Do List** on your LOGASnet home page. You will therefore need to locate the cycle step that you wish to update via **Form Completion ► Enter Data** on the menu.

Amendments after the amendment deadline

If data have been certified and the amendment deadline for that cycle step has passed, the cycle step will no longer be available for you to select. Should you need to make further amendments, you will need to request that the Amendment Deadline for the cycle step be extended ('unlocked') before you can make any amendments.

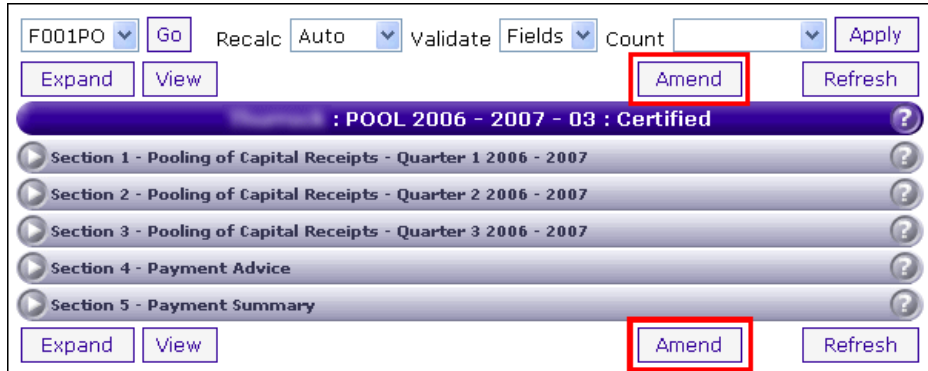
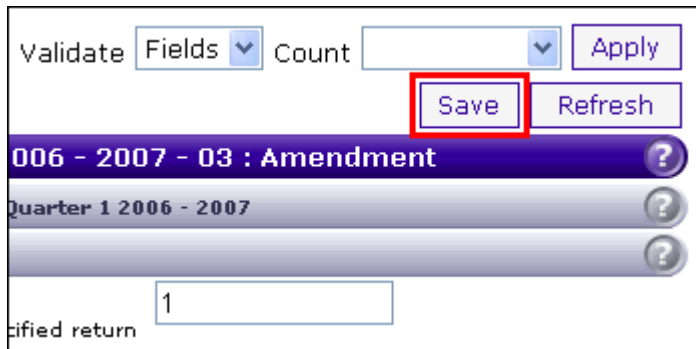
If you require this, please contact the appropriate Grant Administrator or Policy Advisor for further assistance. Grant Administrators can be identified using the **Key Contacts** report available from the **Management Information** menu.

Follow the steps below to amend cycle step data.

Step	Action
1	Locate the cycle step that you wish to amend by using the search fields at the top of the screen and clicking on the Search button. Click on the View link next to the cycle step that you wish to update. 

continued on next page

Amending Cycle Steps, continued

Step	Action										
2	Click on the Amend button at the top or bottom of the online form. 										
3	Update the fields as necessary, following the procedure described in the topic Submitting Data for a Cycle Step: An Overview on page 29. When you have made the required updates, remember to Save your changes. NOTE: The data must now be re-certified by the relevant Claims Certifier. 										
4	The cycle step will now appear in your To Do List with a status of Amendment (as shown in the example below) until the cycle step data has been re-certified. To Do List <table><tr><th>Organisation</th><th>Cycle,Period,Step</th><th>Status</th><th>Deadline</th><th>Action</th></tr><tr><td></td><td>POOL,2006 - 2007,03</td><td>Amendment</td><td>13/04/2007</td><td>Edit</td></tr></table>	Organisation	Cycle,Period,Step	Status	Deadline	Action		POOL,2006 - 2007,03	Amendment	13/04/2007	Edit
Organisation	Cycle,Period,Step	Status	Deadline	Action							
	POOL,2006 - 2007,03	Amendment	13/04/2007	Edit							

Section 4 - Reporting

In this section

This section covers the reporting facilities within LOGASnet.

There are instructions on how to run reports, as well as information about some of the reports available.

Topic	See Page
Available Reports	43
Running Reports	46

Available Reports

Overview

This topic describes some of the available reports in more detail.

The descriptions below include all of the data that may be available to different users. The actual data available to you on a report may be limited by, for example, your level of grant assignment.

End Of Year Statement

This summarises by grant the payments made and receipts collected during the selected financial year identifying any balances outstanding at the financial year end that had not been written off.

DCLG users can run this report for any organisation, but external organisations are limited to their home organisation.

Department for Communities and Local Government - Housing Subsidies and Grants						
End Of Year Statement for 2005 - 2006						
Organisation: Rush District Council						
Cycle, Period: Defective Housing Loan Charge Grant, 2004 - 2005						
Grant	Amount Claimed	Current Entitlement	Amount Paid	Confirmed Receipts	Unconfirmed Receipts	Amount Outstanding
Defects Top Up Loan	£14,773.00	£14,773.00	£14,773.00	£0.00	£0.00	£0.00
Total for Defective Housing Loan Charge Grant, 2004 - 2005 :	£14,773.00	£14,773.00	£14,773.00	£0.00	£0.00	£0.00
Cycle, Period: Disabled Facilities Grant, 2004 - 2005						
Grant	Amount Claimed	Current Entitlement	Amount Paid	Confirmed Receipts	Unconfirmed Receipts	Amount Outstanding
Disabled Facilities Grant	£156,635.00	£156,635.00	£180,000.00	-£23,365.00	£0.00	£0.00
Total for Disabled Facilities Grant, 2004 - 2005 :	£156,635.00	£156,635.00	£180,000.00	-£23,365.00	£0.00	£0.00

Form Data Enquiry

Use this report to create a printable copy of a form.

External users will be limited to reporting on their home organisation. DCLG users can report on any organisation, but the report is limited to certified data.

Department for Communities and Local Government - Housing Subsidies and Grants			
Form Data Enquiry Report			
Cycle Step: Disabled Facilities Grant, 2006 - 2007, First Advance			
Organisation: Rush District Council Status: Certified			
Grant	Field Reference	Field Description	Value
DFG	S000DF	Allocation for 2006-2007: You cannot claim more than your allocation limit	£180,000.00
	F001DF	Towards capital expenditure	£180,000.00
	F002DF	This field is not to be used	£0.00
	F000DF	Amount claimed for disabled facilities grant	£180,000.00

continued on next page

Available Reports, continued

Payments by Organisation

Shows payments made to your organisation or collected from your organisation. Data can be filtered by period or cycle-period, and a specific grant must be selected.

Department for Communities and Local Government-Housing Subsidies and Grants				
Payment History for [Redacted] Period: 2006 - 2007				
Financial Year:	2006 - 2007	Cycle, Period	Payment Date	Amount Paid
Grant:	Disabled Facilities Grant			
Grant Section:	Disabled Facilities Capital			
		Disabled Facilities Grant, 2006 - 2007	15/05/2006	£180,000.00
		Disabled Facilities Grant, 2006 - 2006	15/08/2006	£20,000.00
		Housing Subsidies & Grants, 2003 - 2004	15/08/2006	£0.00
		Housing Subsidies & Grants, 2003 - 2004	16/10/2006	£0.00
Total amount paid for Disabled Facilities Capital				£200,000.00
Total amount paid for Disabled Facilities Grant				£200,000.00
Grant:	Improvement Recoupment			
Grant Section:	Improvement Recoupment			
		First Advance, 2004 - 2005	17/07/2006	£0.00
Total amount paid for Improvement Recoupment				£0.00
Total amount paid for Improvement Recoupment				£0.00

Settled Claims Report

This report is specific to HRAS and is produced when the minded to settle communication is sent or the final decision communication is issued. It shows the amount claimed and the transactions made in respect of a specified financial year. The final amount claimed and the net payments to date are also included.

Department for Communities and Local Government - Housing Subsidies and Grants	
Settle Claim Report for [Redacted]	
Cycle, Period: Housing Subsidies & Grants, 2005 - 2006	Amount Claimed
Step: First Advance	-£1,274,262.00
Step: Second Advance	-£1,274,262.00
Step: 03 - Advance Final	-£1,291,748.00
Step: Auditor Final	-£1,291,748.00
Payment Date	Amount Paid
16/05/2005	-£127,426.00
15/06/2005	-£127,426.00
15/07/2005	-£127,427.00
15/08/2005	-£127,426.00
15/09/2005	-£127,426.00

continued on next page

Available Reports, continued

Statement of Amount Due Shows transactions made in respect of grant claims for a specific payment date.

Department for Communities and Local Government - Housing Subsidies and Grants					
Statement of Amount Due at 15/01/2007					
Organisation: Department for Communities and Local Government					
Cycle, Period: Housing Subsidies & Grants, 2005 - 2006					
Grant	Amount Claimed	Current Entitlement	Amount Paid	Amount Received	Amount Due
HRA Subsidy	-£1,291,748.00	-£1,291,748.00	£0.00	£1,304,801.00	£13,053.00
Total for Housing Subsidies & Grants, 2005 - 2006	-£1,291,748.00	-£1,291,748.00	£0.00	£1,304,801.00	£13,053.00
Cycle, Period: Housing Subsidies & Grants, 2006 - 2007					
Grant	Amount Claimed	Current Entitlement	Amount Paid	Amount Received	Amount Due
HRA Subsidy	-£1,582,586.00	-£1,424,327.00	£0.00	£1,266,069.00	-£158,258.00
Total for Housing Subsidies & Grants, 2006 - 2007	-£1,582,586.00	-£1,424,327.00	£0.00	£1,266,069.00	-£158,258.00
Total for All Years	-£2,874,334.00	-£2,716,075.00	£0.00	£2,570,870.00	-£145,205.00
Where an authority's claim has been suspended, the figures shown in the Statement may not balance.					

User Audit Trail This report shows all changes made to a specific user account e.g. changes to roles, grant assignments etc. It does not show actions carried out by the specified user.

Department for Communities and Local Government - Housing Subsidies and Grants		
User Audit Trail for David Rix		
Date	Action	Description
21/02/2007	User Added	Person: David Rix (David.Rix@test.com) Type: INTERNAL Organisation: Department for Communities and Local Government Valid Until: 01/02/2011 00:00:00 By: David Rix
21/02/2007	User Assigned to Role	Person: David Rix (David.Rix@test.com) RoleName: Review Payment By: David Rix
21/02/2007	User Assigned to Role	Person: David Rix (David.Rix@test.com) RoleName: Enter Data (view) By: David Rix
21/02/2007	User Details Amended	Person: David Rix (David.Rix@test.com) Type: INTERNAL Organisation: Department for Communities and Local Government Valid Until: 01/02/2011 00:00:00 By: David Rix

Running Reports

Overview This topic shows you how to run a report. By nature of the fact that each report contains different information, you will need to input different criteria when running each of the different reports. The example below uses the specific example of the Form Data Enquiry report, but the principle is the same no matter which report you are running.

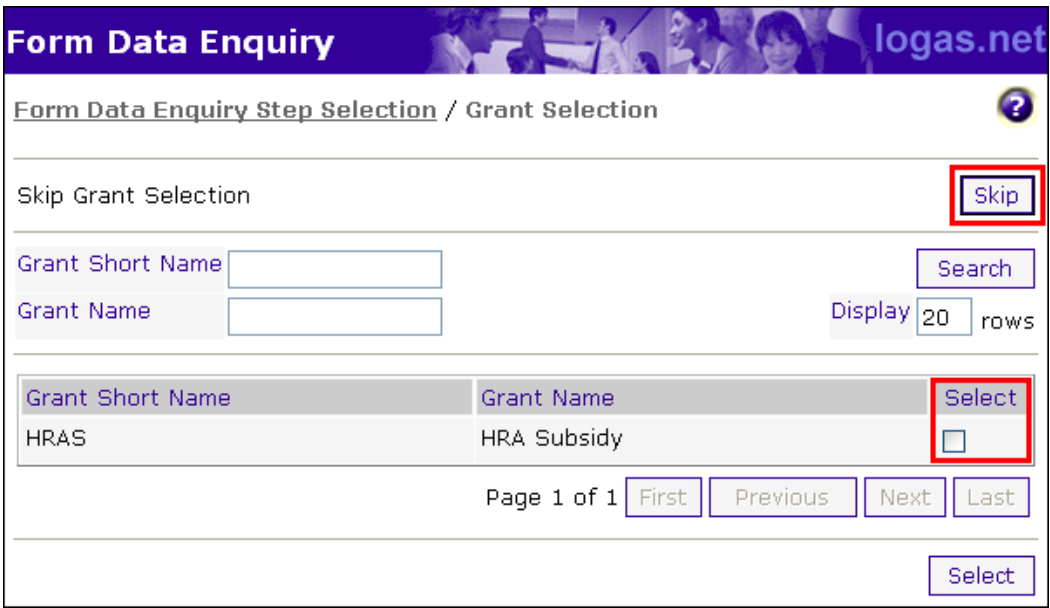
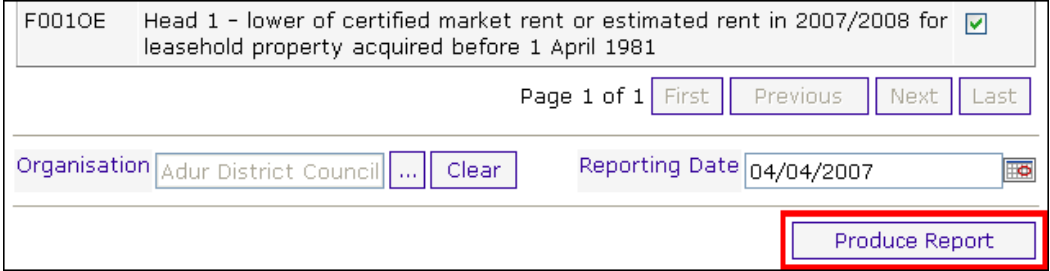
Reports are available under **Management Information** on the menu. Click on the name of the report that you wish to run, and then follow the instructions below.



Step	Action
1	Locate the relevant cycle (in the example below, a search for 2008 has been run on Period Short Name). Select the relevant cycle step by clicking on the Select link. On some reports which do not require a cycle step selection, you have an option to skip this step.

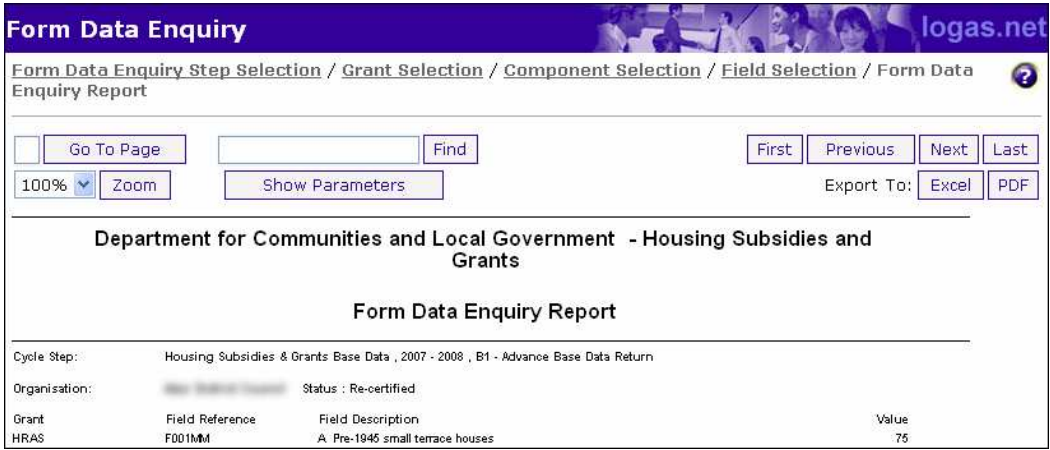
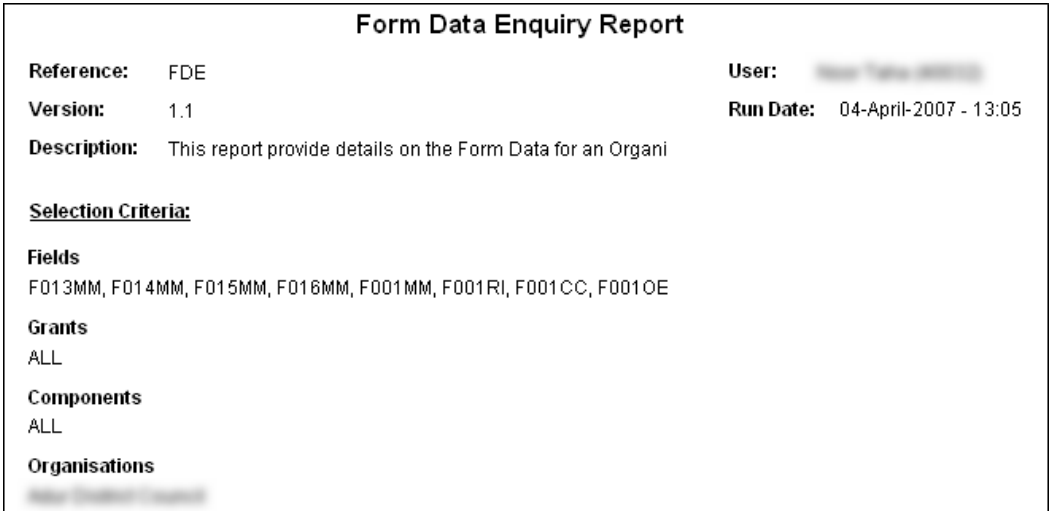
continued on next page

Running Reports, continued

Step	Action
2	For this particular report, you can select a specific grant to report against if required by clicking the relevant Select check box(es). However, this is not a mandatory selection and you can skip this step if you want by clicking on the Skip button. 
3	Click on the Produce Report button when you have entered your search criteria. 

continued on next page

Running Reports, continued

Step	Action
4	The report is displayed. 
5	The fields and the buttons at the top of the screen are common to all reports, and are used as follows: • Go to Page allows you to jump to any page of the report. You can also navigate with the First, Previous, Next and Last buttons. • Find highlights the next instance of the value that you enter. • Zoom controls the level of zoom at which the report is displayed. • Export To: allows you to report the data in Microsoft Excel or Adobe PDF format.
6	The Show Parameters button will display the report parameters on the first page of the report (so you may need to click on the First button to view them). Use the Hide Parameters to remove the parameters from view. 

continued on next page

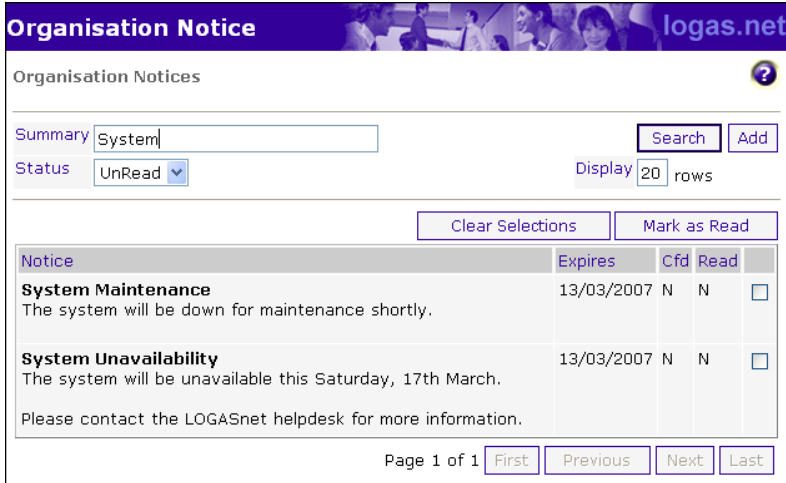
Section 5 - Notices

In this section This section covers how to use the notice facilities within LOGASnet.

Topic	See Page
Reading Notices	50
Creating Notices	51

Reading Notices

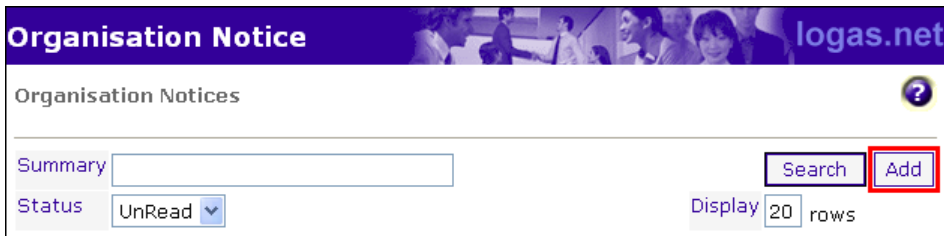
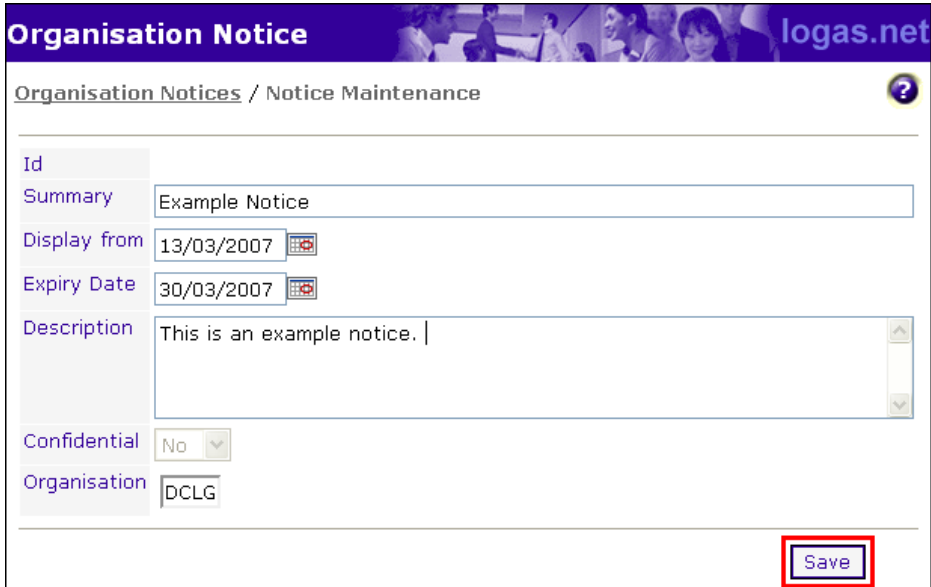
Overview Notification of new notices is displayed to the relevant users on their home page, and they can also be read via **Organisation Notices** on the menu. If you have unread notices for your attention, you are notified on the Home page as shown below in step 1. You can also access the **Organisation Notices** screen by selecting **Communication Management ► Organisation Notices** from the menu.

Step	Action
1	Click on the You have Unread Notices link and the Organisation Notices screen is displayed. . 
2	Use the fields at the top of the screen to search for a specific notice if required. Use the Summary field to search for all notices with the specified search term(s) in the title. In the example below, all notices including the word "System" are being displayed. The Status drop-down list allows you to search for notices that are marked as <i>Read</i>, <i>Unread</i> or <i>All</i>. By default, only <i>Unread</i> messages are displayed, as shown in the example. 
3	To mark a notice as read, tick the Read check box next to the relevant notice, and click on the Mark as Read button. LOGASnet will only notify you on the homepage if there are unread notices for your attention.

Creating Notices

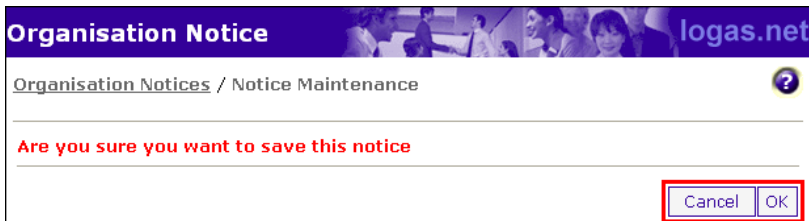
Overview To create a new notice, or to amend an existing one, select **Communication Management ► Organisation Notices** from the menu. The **Organisation Notices** screen is displayed.

Notices are created for a specific organisation, and are not visible to any LOGASnet users outside that organisation.

Step	Action
1	Click on the Add button. 
2	Enter a summary of the notice in the Summary field, and complete the Display from and Expiry Date fields. The notice will only be visible between these 2 dates. Enter the main text of the notice in the Description text box, and click on Save to save the changes. 

continued on next page

Creating Notices, continued

Step	Action
3	You are prompted to confirm that you wish to add the notice. Click on OK to proceed (Cancel returns you to the previous screen, from where you can edit the notice if required). 

Appendix

In this section This section covers the following topics:

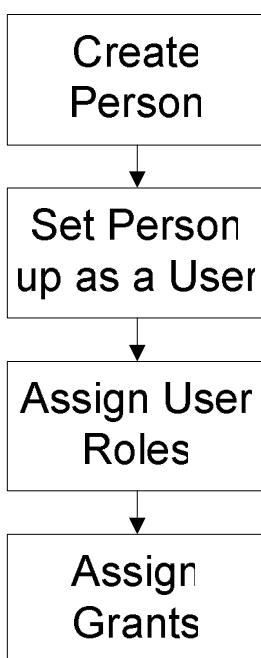
Topic	See Page
Appendix I – Setting Up Claims Officers & Auditors	54

Appendix I - Setting Up Claims Officers & Auditors

Overview The diagram below shows the process for setting up Claims Officers and Auditors. When setting up a new user, you are able to check whether that user has been set up already on the system, thus avoiding setting up duplicate sets of details.

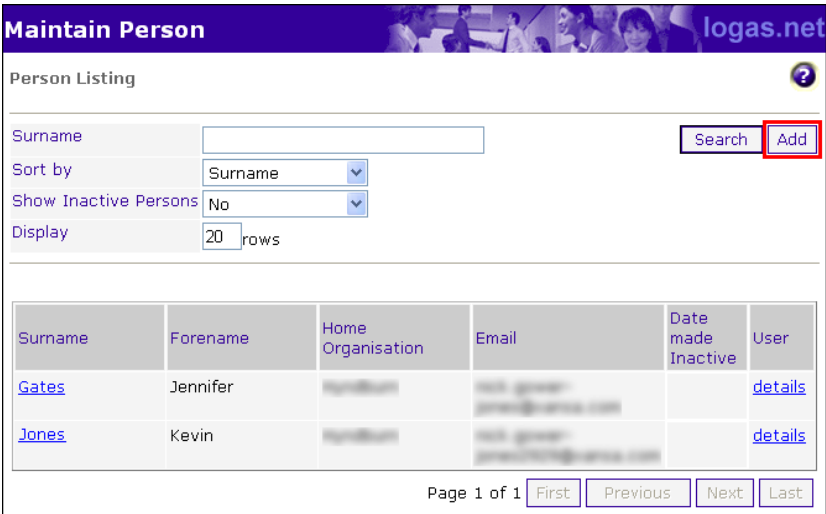
1. Set up new person. Before a user is set up, they must be defined as a person.

3. Assign user roles. A user must be assigned at least one role so they have access to the LOGASnet menu items associated with that role. Users can hold more than one role if required. You will only have the authority to create Claims Officers if you are a Claims Administrator or Auditors if you are an Appointed Auditor.



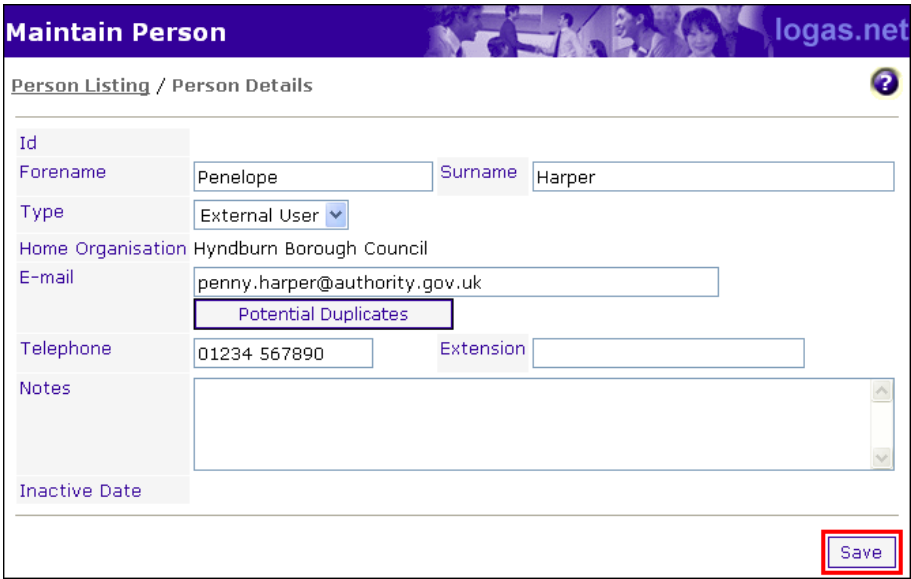
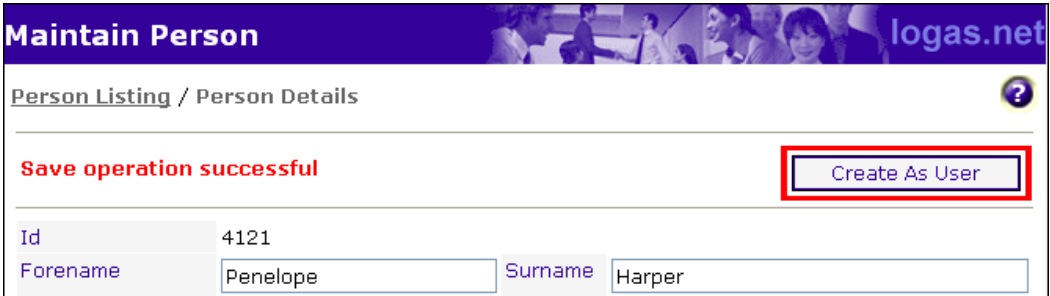
2. Set person up as user. Set a user end date (optional) and generate an activation key and ID. These must be communicated to the user before they can log on.

4. Assign grants to the user. Claims Officers can only enter data against grants to which they are assigned. Auditors can only view data for those cycle steps and organisations which have been assigned to them, they are not grant restricted.

Step	Action
1	Select Administer System ► Maintain Person from the menu. The Maintain Person screen is displayed, listing all existing users. Click on the Add button in the top right hand corner of the screen. 

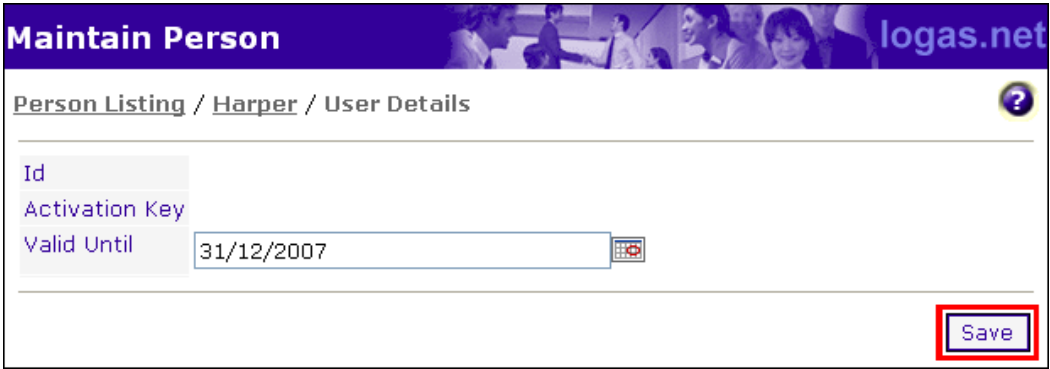
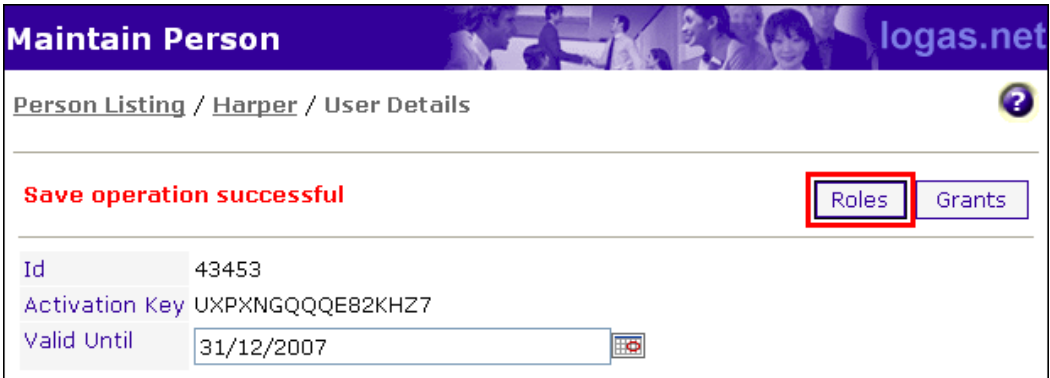
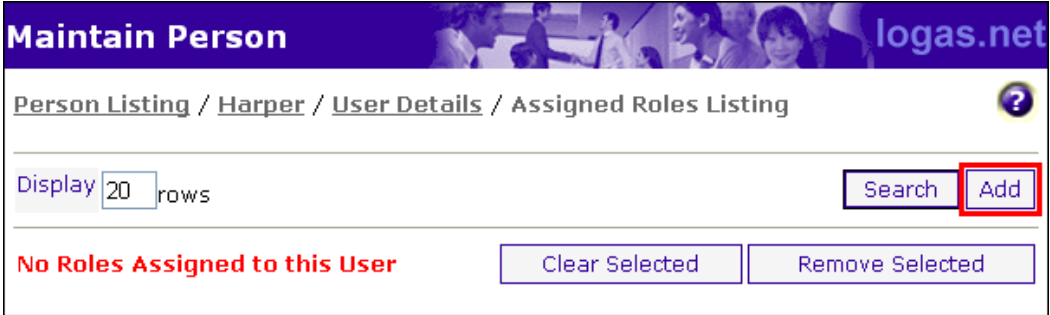
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Setting Up Claims Officers & Auditors, continued

Step	Action
2	Complete the Forename and Surname fields, and enter the new users E-mail address and Telephone number (and Extension if relevant). You must now check whether the person has already been set up on the system by clicking the Potential Duplicates button. The Notes field can be used to enter any additional information about the user that may be relevant. 
3	Any potential matches for your user that already exist on the system are displayed. If you are happy that the users listed are not in fact the same as the user you are setting up, click on Person Details in the crumb trail to return to the previous screen. Click on the Save button when you have completed all fields. A confirmation messages is displayed, and the Create As User button becomes available. Click this button to proceed. 

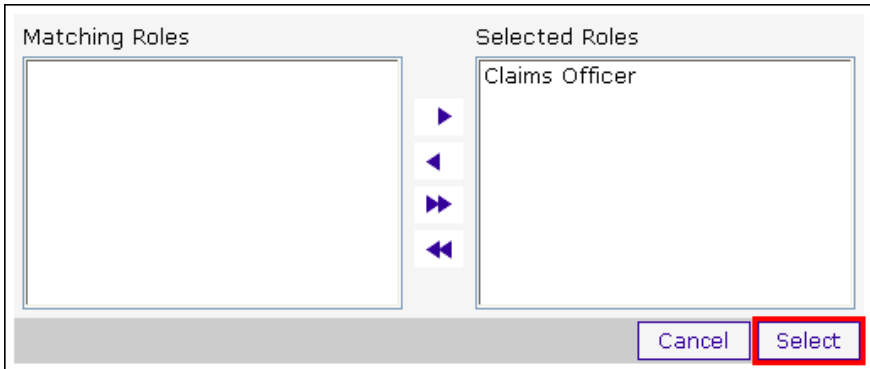
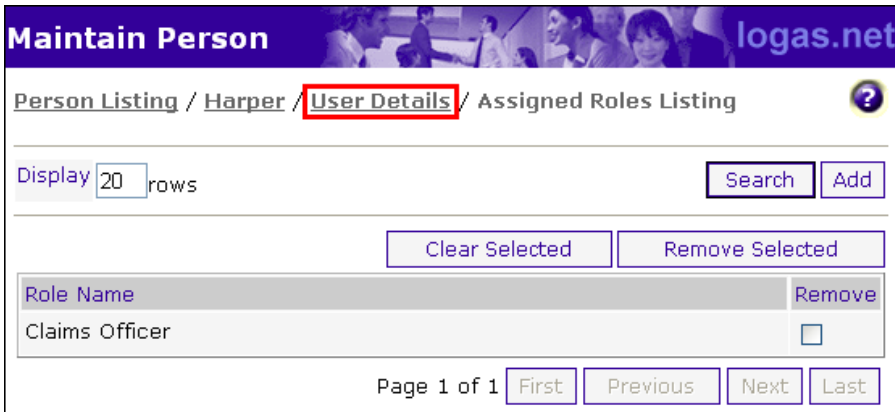
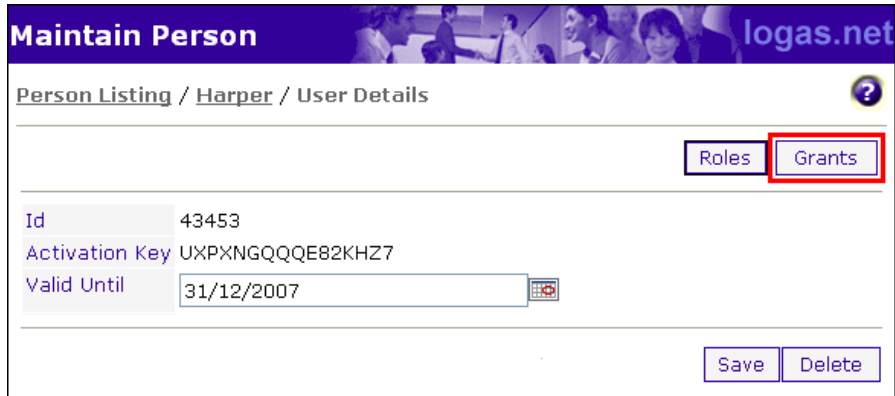
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Setting Up Claims Officers & Auditors, continued

Step	Action
4	Enter an expiry date for the user in the Valid Until field and click the Save button. This is not a mandatory field – the user ID will never expire if you do not complete it.  The screenshot shows the 'Maintain Person' page with the breadcrumb 'Person Listing / Harper / User Details'. The 'Valid Until' field is set to '31/12/2007'. The 'Save' button is highlighted with a red box.
5	A confirmation message is displayed, and the Roles and Grants buttons become available. The Activation Key and ID are displayed - you will need to make a note of these and communicate them to the new user. Click on the Roles button to assign a role to the user.  The screenshot shows the 'Maintain Person' page with the breadcrumb 'Person Listing / Harper / User Details'. A red message 'Save operation successful' is displayed. The 'Roles' button is highlighted with a red box. The user's ID is '43453' and the activation key is 'UXPXNGQQQE82KHZ7'.
6	Assigned roles are displayed, but as you are creating a new user, this list will be empty. Click on the Add button.  The screenshot shows the 'Maintain Person' page with the breadcrumb 'Person Listing / Harper / User Details / Assigned Roles Listing'. The 'Display' dropdown is set to '20 rows'. The 'Add' button is highlighted with a red box. The message 'No Roles Assigned to this User' is displayed.

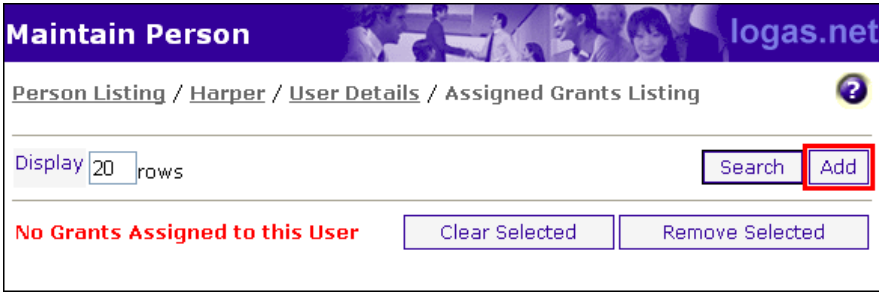
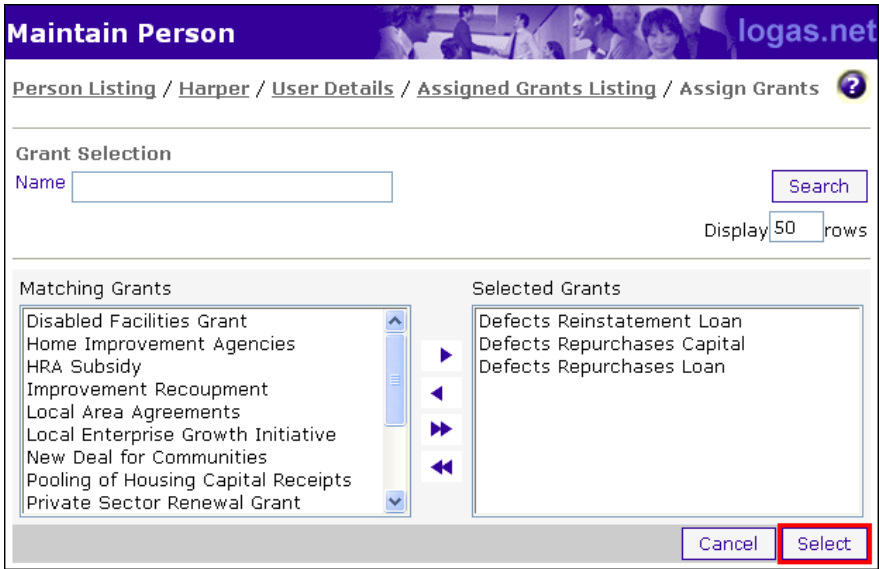
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Setting Up Claims Officers & Auditors, continued

Step	Action
7	Highlight the Claims Officer (or Auditor) role in the Matching Roles box, and click on the ► button to move the role into the Selected Roles box. Click the Select button to proceed. 
8	The Assigned Roles Listing screen is re-displayed, showing the role of Claims Officer. Click on User Details in the crumb trail to assign grants to this user. 
9	Click on the Grants button at the top of the User Details screen. 

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Setting Up Claims Officers & Auditors, continued

Step	Action
10	The Assigned Grants Listing screen is displayed, but as you are creating a new user, this list will be empty. Click on the Add button to assign the user to the relevant grants.  The screenshot shows the 'Maintain Person' interface with the breadcrumb 'Person Listing / Harper / User Details / Assigned Grants Listing'. Below the breadcrumb is a 'Display 20 rows' label and a 'Search' button. The 'Add' button is highlighted with a red box. Below these are three buttons: 'No Grants Assigned to this User' (in red), 'Clear Selected', and 'Remove Selected'.
11	Highlight the required grants in the Matching Grants box, and click on the ► button to move them into the Selected Grants box (hold down Ctrl for multiple selections, or use the ►► button to select all grants). Click on Select when you have made your selection.  The screenshot shows the 'Maintain Person' interface with the breadcrumb 'Person Listing / Harper / User Details / Assigned Grants Listing / Assign Grants'. Below the breadcrumb is a 'Grant Selection' section with a 'Name' input field and a 'Search' button. Below this is a 'Display 50 rows' label. The main area contains two boxes: 'Matching Grants' and 'Selected Grants'. The 'Matching Grants' box lists several grant types, and the 'Selected Grants' box lists three selected grants. Between the boxes are four arrow buttons (►, ◀, ►►, ◀◀). The 'Select' button is highlighted with a red box.

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Setting Up Claims Officers & Auditors, continued

Step	Action
12	The Assigned Grants Listing screen is redisplayed, showing the grants that you have selected. To remove a grant assignment from a user, tick the Remove check box and click on the Remove Selected button. 